

Ontology of Language and the Impact on Transformative Learning Materials
in Adult Training

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Abstract

This study examined three disciplines; Ontology of Language (OoL), Human Resources Development (HRD), and Transformative Learning Theories. The purpose was to find connections between the three topics in the Adult Learning process and develop a Handbook for facilitators containing tools to deliver high-quality experiences by designing competitive spaces equipped for adult learning. The other primary purpose was to share with English speakers the knowledge on the OoL that has been developed in Spanish. This Philosophy has been a powerful tool that assists people to transform learning experiences and promote a lasting change in behaviors, perspectives, and ideas, encouraging critical reflection in every dimension of a person's life. By reading and following suggestions in the fore mentioned Handbook, the practice of teaching becomes an active exchange of conversations, reflections, and feedback that leads to environments where the learner and facilitator find transformation and growth. The adult education field can also use Ontology of Language to enrich the quality and deepness of discussions held in classrooms to ensure students are transforming their views about the world and themselves as leading participants of their learning process.

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CHAPTER ONE: INTRODUCTION TO THE STUDY

The following paper aimed to develop the field of Ontology of Language (OoL) in an organizational context – namely that of Human Resources Development (HRD) – with a specific focus on training adults in the workforce. The OoL is a branch of the *philosophy of language* developed by Rafael Echeverría (2003), a Chilean sociologist and philosopher whose interest was to find the connection between the use of language, the meaning and the intention of the statements we use to communicate, and the effect that conversations have in shaping our reality. Using the precepts and principles of this philosophy, as well as the findings from adult education research around transformative learning, new insight can be developed regarding how adults can learn more effectively and how they can transform their perspective about knowledge. To that end, the research question guiding this study is:

- What opportunities does the study of Ontology of Language (OoL), which has largely been developed in Spanish, provide for the development of transformative training materials in the professional field of Human Resources Development (HRD) in both English and Spanish?

To answer this research question, I explored how OoL has developed as a discipline, coming from the *philosophy of language* that focuses on the meaning and content of human linguistic interactions. To set an appropriate context, I chose to investigate the structure, elements of quality, and effectiveness of the interactions between people within organizations. Furthermore, through an incorporation of the OoL, transformative learning, and Human Resources Development (HRD) best practices, the training process for adults inside organizations can have a significant impact on their development of skills and competencies – and therefore, will be reflected in their general performance.

Finally, in this Major Research Project (MRP), the combination of the three approaches – the Ontology of Language (OoL), Human Resources Development (HRD) best practices, and transformative learning – will provide the insight needed to develop a handbook and a suggested set of guidelines for facilitators. By using the handbook and incorporating the concepts, ideas, exercises, conversational techniques, sets of reflective questions, evaluations, and feedback sheets, the facilitator will have a tool to use in both the design of materials as well as in the delivery process and their assessment of the learning experience. Currently, facilitators in Human Resources Departments and corporate training specialists create their materials and teaching resources, but not all facilitators are professionals in the field of adult learning. However, even though there are guidelines available to suggest some ideas and exercises to incorporate into the learning experience, there is not a recommended guideline in the corporate training field that suggests using the combination of approaches mentioned above to assist in the design of learning spaces that promote transformation, critical thinking, deep reflection, and growth.

Background of the Study

“Language has been a part of the human existence” (Echeverría, 2003, p. 21), and we are defined as linguistic and conversational beings. The study of the OoL in the adult learning context offers an interesting approach in the corporate training field. The OoL provides patterns of language known as *linguistic acts* that promote and enhance the transformation of a person by directly affecting the cycle of their learning process; this is done by using appropriate feedback to create awareness of how the language of the

individual shapes their reality, as well as their future actions. As Echeverría (2003) explains,

The OoL was conceived as a way to put into practice what authors like J.L. Austin, Humberto Maturana, Friedrich Nietzsche, Martin Buber, Ludwig Wittgenstein and the Greek-Roman Philosophers described as the importance of language in creating new actions and realities. This knowledge considers the *observer* as a figure that is mainly responsible for the change process. The observer is any “being with the possibility of changing his concepts to promote different realities in any aspect of their lives. An observer is a way to confer sense to the reality. (p. 47)

Consequently, by helping the observer gain an awareness about the use of *linguistic acts* such as judgments, declarations, affirmations, offers, and petitions, they become responsible for what is causing them not to succeed in their personal and professional quests.

Another relevant aspect that helps observers to embrace a new course of action in their future is the development of *conversational skills*. This term, also coined by Rafael Echeverría (2006) through his work in organizational environments, suggests that by putting in practice a set of skills (listed below), an observer discovers new ways to approach their reality and participate in their various spheres of life from a different perspective. These skills include,

active listening: how competent we are in understanding; *handling judgments*: the sense we give to the world surrounding us; *keeping promises*: create and design healthy emotive spaces for every person surrounding our life spaces; [and]

designing conversations: generate new conversational spaces to achieve goals [emphasis added]. (Echeverría, 2003, p. 31)

The only practical approach that leverages the OoL in organizations can be found through the *ontological coaching* process that has been included very often in companies of all kinds and sizes, which, “works with individuals and groups to identify how the conversational competencies work and how the exchanges of information empower employees” (Echeverria, 2003, p. 28). By facilitating sessions and working on questions that let conversations turn into deep reflections and then into focused actions, leaders and coworkers visualize differently the processes that are allowing – or not allowing – them to achieve short and long-term goals. This ontological process occurs when coaches and employees design questions that provoke deep thinking and the exploration of different ways of looking at beliefs, values, procedures, understandings, agreements, and aspirations. By working with the use of language and exploring possibilities, collaborative communities or teams inside organizations can manifest continuous growth by making sense of new statements that replace the old beliefs that were not letting them move forward.

Organizations nowadays are the places where people acquire skills and abilities that allow them to achieve their goals by using both technical and soft skills (Robbins, 2009). This acquisition process happens both formally – for instance, by attending training – or informally – for instance, learning by doing on-the-job. The *technical skills* allow an individual to complete specific tasks in a discipline, like accounting or computer science. The *soft skills*, which are the very focus of this paper, are those that assist the employee in their human interactions with peers and colleagues (Alles, 2005). A few

examples of these soft skills include leadership, collaboration, result orientation, planning and organizing, and adaptability (Alles, 2005). As adults are already in a working environment, it is inevitable that most of their education or training processes happen inside an institution.

The training process inside organizations has changed significantly since the access to resources like research, books and internet became available to individuals and companies, because, in the past, training served mainly as a necessary resource to ensure a person could perform a certain number of independent tasks – but training did not, however, help to develop a competency that would promote personal and professional growth towards organizational goals (Drucker, 1999). Therefore, it is important that both the student and the facilitator take on an active role, since both generate learning spaces where questions are the catalyst of curiosity, and promote the further creation of useful knowledge that can be applied in the workplace.

The techniques, ideas, and suggestions that facilitators use to assist employees have generally come from the works of Jack Mezirow, Malcolm Knowles, and scholars dedicated to understanding how adults learn. Research by Knowles (2012) indicates that adults base their learning on their particular needs, and their experiences must be used to enhance lessons, materials, and other resources to achieve learning goals. Adding to these two elements, the literature on adult learning and education also shows that one of the key factors for accomplishing learning is to focus on the sense-making and meaning making processes within the topics delivered. When this happens, adults perceive and understand how the material and new concepts have to be incorporated effectively in the workplace or in specific situations (Mackeracher, 2004; Mezirow, 2000). Further, by incorporating these practices, the experience of participating in the acquisition of

knowledge is active and allows the person to incorporate new insights that affect their behavior either temporally or permanently. This is the transformational aspect of learning: when it stops being informative and instead becomes an element to modify current and future thoughts and actions.

To this point, in the market, there are guidelines, courses, exercises, and templates available to assist corporate facilitators and corporate training specialists in the development of their training materials for soft skills development. However, there is no evidence yet of material using aspects from the OoL and transformative learning frameworks, which when synthesized, would enrich the whole process of learning, the design of the material, the design of learning spaces, the assessment and evaluation of competency, and the follow-up process.

Problem Context

Inside companies, employees are expected to complete specific tasks, assignments, or goals in defined timeframes and with precise quality controls. To accomplish each task, adults put into practice not only their academic knowledge, but also their experience in different work settings (Alles, 2005). Aside from the knowledge acquired, organizations continually focus their efforts on training soft skills to provide their employees with the information, materials, and practice that allow them to perform more competitively and to increase the quality of the outcomes according to the position every person assumes. Training then becomes one of the many strategies that HRD consider in their annual road maps as a process that has to ensure better overall performance within the organization (Knowles, 2012). This training can either be internal – performed by HRD specialists – or external – performed by specific consultants and experts in different fields.

Regarding soft skills, there is no evidence in the literature that one way is better than the other; however, hosting learning activities with internal resources is sometimes more affordable and accessible than hiring professionals and more expensive services.

The training process is a complex task to accomplish. On the one hand, there is need for knowledge and the use of innovative resources that promote reflection and engagement with the learning experience. However, it is common to find people in the field of HRD whose academic and professional background is not related to education. This poses a constant problem in the delivery of learning experiences because every person creates courses, seminars, or activities based on the needs of the organization and not on best practices of adult learning knowledge (Cranton & Grabove, 1997). Another aspect to consider is that, at the moment, the use of technology, including iPads, smartphones, smartboards, virtual reality, videogames, online courses, webinars, virtual classrooms and learning platforms, is a trend; some organizations lean towards this option to make training accessible to coworkers rather than blending it with one-on-one sessions with a facilitator who works to guide the learning process and give feedback when necessary adjustments have to be made (Song, 2016)

The process of training in soft skills not only includes just the provision of information to a defined group of people, but it has become a strategy that demands experts to prepare and deliver adequate content to specific audiences according to the topic being studied (Alles, 2005). The materials and resources used inside learning spaces are not always effective and cannot always be transferred immediately into the workplace. In most cases, materials and resources are customized and tailored to the specific needs of the students by either internal facilitators or external consultants. Also,

facilitators use different delivery styles, and the information and materials are not always properly adapted to the specific group of people taking part in the training. In most cases, after attending a course, there is no further feedback regarding the application of the course content or support for addressing the possible problems in implementing new initiatives.

Training is a process that can lead to the success of every employee inside an organization; therefore, the creation, delivery, assessment, and feedback components of courses should follow guidelines that ensure the optimal use of their potential and provide a transformative learning experience, both for the instructor and for the student. By using elements of the OoL, as well as aspects drawn from transformative learning theories, the learning process can be enhanced and enriched for both the adult learner and the instructor. It is therefore my aim to develop a project that will strengthen and improve the materials and the preparation process for facilitators to provide better training and therefore, promote organizational change.

Methodology

The research was conducted by exploring and analyzing existing theories about language and adult learning processes; with that, this study developed a manual with guidelines that will help trainers to both enhance the materials to be used in organizational training and to assess the effect on employees and their performance. The first part of this project will address the existing framework and theories from the OoL that currently exist in Spanish, as this framework will guide the research process. Next, the project will detail the types of professional HRD contexts and will develop distinctions of affirmations, declarations, offers, promises, and judgments, as well as a

feedback process that will have a key role in how employees understand knowledge and how they adopt new ways of thinking and behaving inside organizations. This knowledge could be used in both Spanish and English by trainers and instructional designers. To define the manual and guidelines, I used the following steps:

- (1) Built on the existing theoretical framework and conducted a critical literature review related to the OoL. I then translated the concepts and ideas from Spanish to the English language, defining how these concepts could be used to explain the impact that the adult student will experience with the training process.
- (2) Researched the best practices and training trends in HRD to understand what challenges and opportunities the field is facing regarding training.
- (3) Developed a training manual/handbook for instructors, facilitators, or instructional designers that could be applied to any topic associated with soft skills and competencies, with the ultimate goal being to help a person perform more effectively inside the organization and therefore, achieve their goals.

Rationale

This research is situated in the organizational context, focusing primarily on the adult learning process and how the creation of valuable materials, using relevant concepts and language, can benefit employees' performance as well as their development as individuals (Cranton & Mezirow, 1997). Based on my professional background, I have found that the training process inside organizations has changed significantly. Employees today give new material and knowledge greater value because it reflects upon their general performance – mainly because they feel that they are growing personally and also professionally, which leads to an increased chance of being promoted.

There are essentially two types of organizations that can greatly benefit from this research. The first type of organization would be classified as a large organization, where more than 100 people collaborate in different areas, departments, and processes. These organizations could be domestic or international, and thus need to have a solid HRD department with training specialists dedicated to either traditional and online modalities. The advantage of having this specialized knowledge is that it helps create instruction guides as well as training materials so that training can be delivered and shared effectively as many times as needed, and can be updated upon special need or based on regular requirements. The HRD professionals in these organizations will benefit from the guidelines provided in this research because it will give steps and ideas to increase the effectiveness of the training process for employees. The second kind of organization that can benefit from this research is consulting groups or agencies which are focused on developing materials for training courses for big or small groups. These organizations can customize special materials and provide a meaningful way to deliver training content so that employees can transfer it to their daily routines. The implication of using the OoL as the main element of this training is that it shares a way to understand the learning process by focusing on the way the student understands their world through the *linguistic acts* they use to communicate. By emphasizing these language elements, instructors intervene directly in the structure of the student's language, and can promote new ways of visualizing reality – and therefore, new ways of exercising true potential.

After analyzing the material and the links between the OoL and transformative learning in the HRD context, the new training materials can be delivered either in a face-to-face interaction or by using online resources and platforms. The key element of

designing new content will be using different questions and exercises to help an observer move to a more meaningful way of understanding the skills that can help them succeed in a job position.

The handbook contains sections such as:

- (1) The purpose of learning in adult settings and transformative learning concepts and contexts including:
 - (a) The learning process in adult settings.
 - (b) Theories and learning strategies.
 - (c) Learning environment;
- (2) The role of the facilitator in the training experience and the skills required by the facilitator to promote effective transformative learning environments.
- (3) The Ontology of Language (OoL) and the key elements to include in the training process.
- (4) The design process for developing training materials for soft skills.
- (5) Activities and resources to assist the instructor in developing meaningful materials, including:
 - (a) Conversations (guidelines);
 - (b) Exercises (guidelines);
 - (c) Handouts;
- (6) Feedback and assessment for instructors and students.

This handbook offers multiple readabilities: first, there is the possibility of studying the handbook by beginning with the first section in chronological order, but second, specific parts could be consulted separately to obtain new practical ideas and use

them in the training process. It would be advisable to follow all the training in order to include the OoL elements fully. However, if an instructor needs only to collect ideas for specific interventions, those aspects could be consulted individually.

In the application of the ideas from this handbook, it is important that the role of the student and the trainer both become active, since they each generate learning spaces where questions are the catalyst for curiosity, and prompt the further creation of useful information – in this case, knowledge – which can be applied in the workplace. Drawing from the OoL framework of Echeverría (2003), the aim of the paper was to investigate how the learner moves from a static position to the point of becoming an active participant in their own learning process, and how their newly created concepts help them to fulfill their job goals. The OoL theory has been developed in Spanish by Rafael Echeverría (2003) and there is currently no existing literature explaining this approach in English. Some of the relevant concepts from the field of ontology that help in this process are declaration, affirmation, offer, promise and judgment, as well as the feedback process, all which ensure that the learner is moving forward in achieving their established goals. Leveraging these principles specifically, this handbook will increase the possibility of trainers and instructors in both Spanish and English enhancing their training materials as well as their style in conducting seminars.

Organizations that focus their efforts on expanding the experience and knowledge of the employee are those that are constantly awarded for their innovation and organizational change, like those seen in the lists of *Great Place to Work Institute* (Great Place to Work, 2017) or *Forbes Magazine* (Forbes, 2017). Companies such as these are the very organizations who would potentially use the guidelines in this

handbook because they already have in place training mechanisms that will allow them to include more training ideas and creative elements to continue the learning process of their employees.

Ethical Considerations

For this paper, no consideration was given to the possibility of using specific participants for interviews, surveys, or further conversations. This study only contemplates the use of existing literature to draw conclusions about how to use the theories and concepts in combination within an organizational context. All the materials used for this research project are found publicly and no special requests were made for specific people or institutions.

Challenges with Translating from Spanish

The topic studied for this research project included a fair amount of literature in the Spanish language. The main exponent of the theory and the creator of this philosophical work – Echeverría (2003) – is Chilean and a native Spanish speaker.

The act of translation was new to me until I started working on this research quest. The value of words, concepts, and appropriate meanings has been a challenge that I have encountered because some words and expressions have no exact match in English, either grammatically or culturally. The act of transferring knowledge from one language to another requires the understanding of the context in which the information will be read, in addition to the right vocabulary to ensure the intention of the text prevails. This is particularly relevant to this study, since the information needs to be understood and comprehended in the most accurate way so that it becomes meaningful to the readers and potential instructors or facilitators.

CHAPTER TWO: REVIEW OF RELATED LITERATURE

This chapter will address the language elements that are studied by Ontology of Language as well as the relevant literature coming from the Transformative Learning Theories and their impact in the Human Resources Development in today's organizations.

The aim of this paper is to study language not as, “the method of human communication, either spoken or written, consisting of the use of words in a structured and conventional way” (English Oxford Living Dictionary, n.d.) or as, “a system of communication used by a particular country or community” (English Oxford Living Dictionary, n.d.). Rather, it is to understand language from a social perspective and as the creator of actions that shape our life and our experiences. This perspective is explored through the Ontology of Language (OoL) philosophy. OoL was developed using knowledge from language philosophers like J. L. Austin, Frederick Nietzsche, Martin Buber, and Ludwig Wittgenstein, and the concepts and terms were further developed by considering other approaches from biology and philosophy. The term *ontology* is defined in the English Oxford Living Dictionary as, “the branch of metaphysics dealing with the nature of being” (n.d.), but when combined with the language part, it, “represents an effort to offer a new interpretation of what it means to be human” (Echeverría, 2003, p. 12). Therefore, throughout this study, the term *language* will implicate the understanding of the process in which people speak, and how every human expresses their ideas to create and make sense of the world they are living in. The exploration of the OoL will bring to the education and organizational field a distinction as to how language is directly

related to increasing the productivity, loyalty, and support from leaders and employees. In any organization, this can be achieved through appropriate training materials as well as the development of skills that allow every person to interact and be an active participant in the knowledge management process. So far, OoL has had an active role through the exercise of Coaching for employees and for leaders. By using structured and powerful conversations, leaders promote transformative learning in their colleagues and teams. They achieve this by giving constant feedback and promoting environments where questions are an effective tool to find and discover new ideas. In this study, I will also combine the OoL concepts and models with the ones explored by transformative learning theories and with both synergized, I will suggest a different method for designing creative and effective learning spaces.

Ontology of Language (OoL)

All concepts, principles, postulations, and distinctions presented here, as a part of the contribution that OoL gives to the world, are those that impact directly on the transformative learning process in adults. By sharing, defining, and explaining how they interact with our daily speaking routines, it will be easier for facilitators and HRD specialists to see the relevant connections between the philosophy and the real life training experiences inside organizations. These concepts can be adopted, analyzed, incorporated, and practiced to make profound changes not only in adult students, but also in the organizational system where people work every day. Through this text, there will be examples and phrases that illustrate the concepts explored by the OoL. It will be frequent to find these symbols – « and » –share words or sentences that show how every concept is typically used. In Spanish literature, it is common to find these symbols when the author wants to give examples or phrases and emphasise the relevance for the reader.

The OoL is the contribution made by Rafael Echeverría (2003) to the field of linguistics, human resources, and coaching, and his studies led him to understand how language interacts with actions and how those actions shape the reality in which every person lives. The focus of this contribution is not language itself, but rather how individuals live, describe, and interact with it.

The ontology proposal was developed by Echeverría (2003), who observed that after 25 centuries, humanity still followed certain ideas and precepts coming from the metaphysical approach that was mainly guided by the Greek philosophers. For example, “we are in a determined way and we will not be able to change” (Echeverría, 2003, p. 21). Echeverría (2003) also noticed that language plays a significant role in the shaping of our reality, regardless of our cultural background and language. The OoL is thus a new way of observing our linguistic interactions and offers new tools to our conversations to allow us to increase the level of awareness of our discourse.

The OoL, “represents an effort to offer a new interpretation of what it means to be human” (Echeverría, 2003, p. 12). This new approach is based on three main assumptions:

- (1) Human beings are interpreted as linguistic beings. Language makes humans the particular beings they are and through language, humans confer a sense of reality to their existence (Echeverría, 2003). Human beings live in language. Language is the key to understanding human phenomena. The human existence recognizes three main domains: body, emotion, and language – and by observing those aspects, we can identify relations of coherence.
- (2) Language is generative. In the past, it was believed that language only allowed us to talk and describe things, objects, and events. However, language makes things happen; it creates new realities. Language generates an individual representation

of self and language is action (Echeverría, 2003). As humans, we can alter the spontaneous course of events with language.

- (3) Human beings create themselves through language. Each individual is born with a particular way of being. Life allows us to discover how we really are. Thus, individuals invent themselves through language (Echeverría, 2003).

Everything that is said is, in fact, said by someone. We cannot describe exactly how things, events or circumstances are, but we can say our own interpretation of them and how we as humans have learned to look at them. The OoL is based on two principles. Firstly, we do not know how things are, we only know how we observe them or how we interpret them. We live in interpretative worlds, and our perceptions come from the biological structure we carry and from the agents of our environment. Secondly, we only act how we are and we also are the way we act (Echeverría, 2003). Action generates being; our actions only reveal how we are, but they also allow us to transform into different beings (Echeverría, 2003).

The Language as Coordinator of Actions – Language is Recursive

Language allows individuals to reflect on situations. We can reflect on our own being and we can ask ourselves about aspects of our own life and experience. We can make the language spin and show a different perspective of what we are living and experiencing. We give a new interpretation to a specific situation once we can revisit it and ask questions. (Echeverría, 2003).

The person we are is thus actually a linguistic phenomenon, since the way we make sense of our life is linguistic. This means that everything we experience, think and feel can be expressed with words, symbols or signs. We as human beings communicate either through words, spoken language, symbols or sign language (for those that speaking is an impediment). The idea is to identify the meaning of what it is being said and make sense through our stories. When we modify our story, we change our identity. The stories we tell ultimately shape the way we are and how we see the world. We live and grow in a social culture. Therefore, the individual is a social phenomenon. How we confer sense and how we act in our society also reflects the community to which we belong. Individuals are generated inside a linguistic culture. (Echeverría, 2003)

The OSAR Model and the Transformative Learning Experience

The OoL helps to explain the transformative learning experience in adults. Therefore, all related concepts directly linked to this learning experience will be defined in this section, as well as the excerpts of the philosophy coming from Spanish that directly inform how adults, as observers, interact with language and how they shape their reality for lasting behavioral change.

The transformative learning experience proposed by the OoL starts with the OSAR Model. In Spanish and English, every letter stands for the same concept:

- O – Observador (Observer);
- S – Sistema (System);
- A – Acción (Action);
- R – Resultado (Result).

The acronym OSAR itself means, “to dear” and it is a verb that directly means to take action, and to explore new scenarios and environments. The model in Figure 1 is directly taken from the original literature and shows the following interactions:

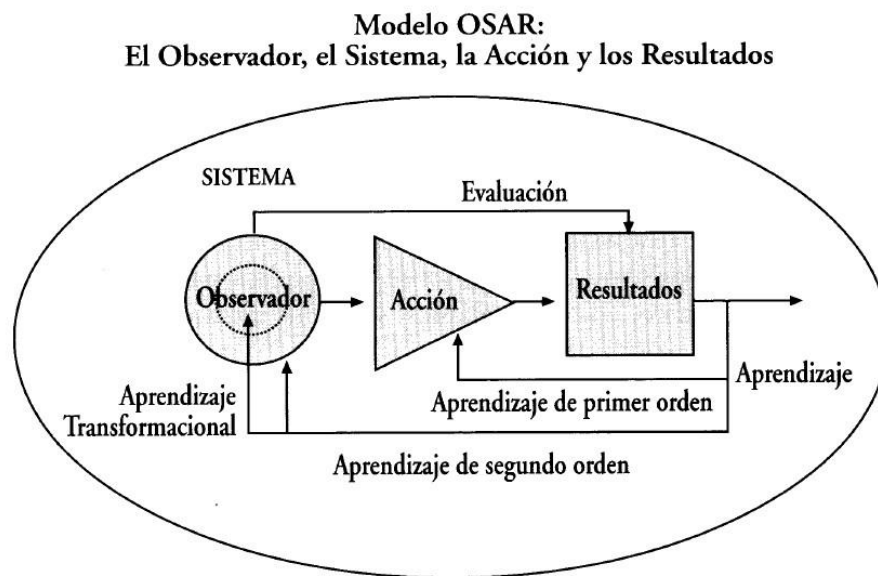


Figure 1.

OSAR Model (2003).¹

The way to read this model is to begin at the right side; therefore, the *results* are the first to be explored. The literature reads, “Los resultados en la vida son el criterio fundamental para evaluar nuestro comportamiento” (Echeverría, 2009, p. 93). This means that the ultimate criteria to evaluate our behavior can be seen through our results and nothing else. Echeverría (2003) goes on to say, “Todo resultado remite a las acciones que lo producen y es sólo examinando los resultados que nos es posible establecer el grado de

¹ Translation: Sistema – System; Evaluación – Evaluation; Observador – Observer; Acción – Action; Resultados – Results; Aprendizaje Transformacional – Transformative Learning; Aprendizaje – Learning; Aprendizaje de Primer Orden – First Order Learning; and Aprendizaje de Segundo Orden – Second Order Learning.

eficacia y poder, siempre relativos, que corresponden a nuestras acciones e interpretaciones” (Echeverría, 2009, p. 99). This explains that every result will only be explained by the actions that produced it and it is only at that point that the efficacy level can be measured. Therefore, the OoL states that the results are the most important aspect of an individual’s performance and will always be linked to what matters to the individual. The *action*, the second element in the diagram when moving from right to left, are those activities, initiatives, and tasks that are done by an observer in any given moment or circumstance. These could be planned or unplanned. They could be assigned by leaders and coworkers in an organizational environment, or they could be activities performed at home or in personal situations with other individuals, who are also observers, and who also look at their results to measure success.

The role of the observer is crucial since the concepts and ideas develop, change, and become transformative. Echeverría (2009) explains² that every individual is a particular type of observer, and that observer tries to give sense and meaning to everything that happens in their surroundings. When an observer defines the meaning they give to a particular event or situation, it conditions their future responses and actions. When the observer defines a particular interpretation of a situation, they also formulate problems in a way that allows them to follow – or not follow – certain actions and to restrict their behavior according to that definition. Basically, our capacity for

²Original text: “Cada uno de nosotros es un tipo particular de observador que hace sentido, de una u otra manera, de lo que está pasando. Tal sentido es un condicionante decisivo de las acciones que visualizamos a nuestro alcance ... A partir de una determinada interpretación, emerge un conjunto de acciones posibles, pero simultáneamente se excluyen otras y la manera en la que formulamos el problema nos llevará a ejecutar determinadas acciones, cuando se reformulan los problemas desde otra interpretación, se pueden emprender diferentes acciones ... Nuestra capacidad de acción, depende pues, del tipo de observador que somos, de la mirada que desplegamos de las cosas” (Echeverría, 2009, p. 109-110).

action depends on the type of observer we are and how we decide to observe the world. Echeverría (2003) has an example to show the power of observation: if a person goes to enjoy a starry night in the countryside, they will probably see what are called stars or light dots in the sky – but if that same person is joined by an astronomer, the sky they will see will be different because the astronomer will provide distinctions in the observation that were not visible before. This is when the observer shifts and has no way back to see things the same way they originally did. The observer changes because they learned a new distinction that was not there before, either because of a lack of knowledge or because they were not placed in a space and time that could allow them to ask themselves more about a specific phenomenon. *Distinctions*, then, are new meanings and interpretations of events or concepts which are used to describe anything that happens.

In following the OSAR Model, once the results are analyzed as a consequence of the actions taken in a given situation, the actions can be defined by the particular observation and interpretation of the world by an observer. At this point, it is assumed that every individual, being a different observer, may interpret an event or situation in a different way, and therefore, different actions should follow. Observers try to make sense and look for coherence in their emotionality, corporality, and language.

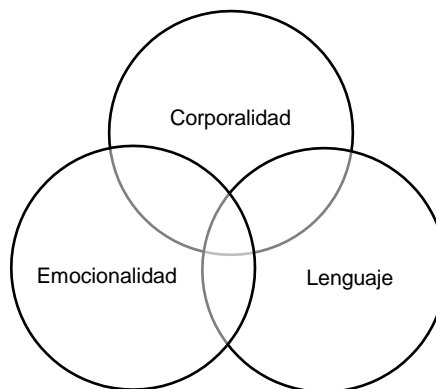


Figure 2.

Elements that Bring Coherence to the Observer's Discourse.³

The elements shown above are key components that inform how observers make sense and react to a given situation or event. OoL states that *corporality* refers to the way people move, walk, feel, sense, dance, run, and any other physical movements which all fall into this concept.⁴ Observers have a particular way to move and to interact physically with their environment. Corporality is related to the way information is perceived by the body. Emotions are elements that reside inside individuals. Emotionality constitutes us as different observers and different emotional states predispose individuals to observe or ignore certain situations or events. When talking about emotionality, Echeverría (2003) notes⁵ that observations will change according to the emotional state in which individuals live at every moment, and will provide different possibilities for action. Every observer has a repertoire of emotions: those whose emotions tend to be negative may experience fewer possibilities of action since they limit their possibilities of being open to feel different feelings.

Finally, it is because of language that individuals are different observers (Echeverría, 2009) and it is in this area that the OoL incorporates the different *linguistic acts* and listening competency. Echeverría (2009) notes⁶ that it is when different

³ Translation: Corporalidad – Corporality; Emocionalidad – Emotionality; and Lenguaje – Language.

⁴ Original text: “Corporalidad se refiere a todo comportamiento físico del individuo en cuanto toma posición en un sistema más amplio en el cual se encuentra inserto” (Echeverría, 2009, p. 164).

⁵ Original text: “De acuerdo a la emocionalidad en que estemos en un momento dado, nuestros mundos son diferentes, la emocionalidad colorea nuestras observaciones de maneras diferentes, Cada uno de nosotros posee distintos repertorios de emociones y también experimenta diferencias en sus grados de intensidad” (Echeverría, 2003, p. 165).

⁶ Original text: “Los seres humanos, observamos según las distinciones que tengamos, de las diversas distinciones surgen diferentes posibilidades de acción, lo que hace el lenguaje es configurar el carácter de lo que vemos” (Echeverría, 2009, p. 179).

linguistic acts are consciously incorporated in everyday interactions with oneself and with other individuals where learning occurs and begins shapes our reality. The OoL considers five *linguistic acts* and one element that further will be referred to as *judgement* that assists individuals in their interpretation of the world. The OoL states⁷ that a *linguistic act* happens each time we talk; we are responsible for what we say and the act of talking forces us to acquire social commitments. Speaking is never an innocent act: when we say something, we must be certain of the implications of what we choose to say.

These *linguistic acts* are called Afirmaciones (*affirmations*), Declaraciones (*declarations*), Promesas (*promises*), Peticiones (*petitions*), and Ofertas (*offers*), which are each detailed below.

Affirmations⁸

As a linguistic act, *affirmations* report what the individual observes in the world. They are mere descriptions and interpretations, not the reality. When we affirm something, we have to be able to provide evidence of the observation, and therefore, observations can be true or false. The evidence could be a witness in our own community who confirms that something was indeed true: for example, that it rained early in the morning. If the observer is affirming this, they have to bring proof through facts or through observers to make it true – therefore, it will continue being an affirmation, however, it will and can be false. The word *affirmation* does not imply that whatever is said will be true or positive – in fact, it could be the opposite – because affirmations

⁷ Original text: “Cada vez que ejecutamos un acto linguístico, adquirimos un compromiso y debemos aceptar la responsabilidad social de lo que decimos. El hablar nunca es un acto inocente. Cada acto ligüístico se caracteriza por involucrar compromisos sociales diferentes” (Echeverría, 2003, p. 44).

⁸ Description interpreted from the following excerpt: “las afirmaciones normalmente las llamamos descripciones. En efecto, ellas parecen descripciones, se trata sin embargo de proposiciones acerca de nuestras observaciones. Los seres humanos podemos compartir lo que observamos, suponemos que esta es la manera en como son las cosas” (Echeverría, 2003, p. 42).

merely report what is seen. *Affirmations* are also relevant or irrelevant, depending on the relationship they have with our concerns.

Declarations⁹

Next, *declarations* have the power to change reality. The world is transformed by the power of words, as we generate new environments and worlds when we pronounce declarations. They are found in everyday life routines. Some examples can be found when a judge in court says, « Innocent! », or when we apply for a job and we read, « You are hired! », or even in a couple commitment like, « You are now husband and wife ». These words change the way the world was before they were said. We only have the power to change the world if we keep up with what we said. Declarations can be valid or invalid, and that depends on the power of the person who says them. If a doctor pronounces, « The patient is dead », the power of this declaration has to be supported with evidence. Some declarations, commonly found in our daily human communicative and linguistic interactions, are: « No » and « Yes », which these change the reality and open or close possibilities; « I do not know », which is a declaration of ignorance and the first step in the learning process; « Thank you », which is an opportunity to celebrate life and join others in the celebration of what life has provided; « I am sorry », « Forgive me », and « I forgive you », which are commonly found when we promise something and do not keep up to what we said; and lastly, « I love you » confirms the bond between two people, while also helping to establish the relationship and link between two people.

⁹ Description interpreted from the following excerpts: (1) “Cuando hacemos declaraciones, no hablamos acerca del mundo, generamos un nuevo mundo para nosotros. La palabra genera una realidad diferente. El mundo ya no es el mismo que antes, fue transformado por el poder de la palabra” (Echeverría, 2003, p. 44); and (2) “Las declaraciones no son verdaderas o falsas, son válidas o inválidas, según el poder de la persona que las hace” (Echeverría, 2003, p. 46).

Promises¹⁰

When *promises* appear in our discourse, it means that we have acquired a social commitment with someone to do something in the future. When a promise has been made, there are four elements that assist in the coordination of actions: the receiver or listener; the sender or speaker; the action; and the conditions of satisfaction and the time frame. *Promises* always involve a conversation between people. It is possible to promise oneself something, but it will typically be, instead, in the form of a *declaration* like, « I will begin my assignments tomorrow ». When promises are discussed, another person is required to commit and engage with us. Promises could be offered and accepted or asked and accepted – and in both cases, there has to be a declaration of acceptance from the receiver to know that the agreed conditions were met. To make promises requires consent from at least two people, and to get to the point of consent, individuals may use offers or petitions, plus a declaration of acceptance.

Petitions¹¹

Petitions are linguistic movements that require the receiver, or the other individual involved in the conversation, to obtain a promise from the sender. Questions are a type of *petition*, like the following example: « If I ask you to look after my dog, would you, do it? », the receiver could reply, « Yes, count on it ». When a petition is denied, there is no

¹⁰ Description interpreted from the following excerpt: “Las promesas son actos lingüísticos que nos permiten coordinar acciones con otros. Cuando alguien hace una promesa, él o ella se compromete ante otro a ejecutar alguna acción en el futuro” (Echeverría, 2003, p. 54).

¹¹ Description interpreted from the following excerpt: “Las peticiones son movimientos lingüísticos para obtener una promesa del oyente, una petición puede ser rehusada y, si esto sucede, no se ha hecho promesa. La petición supone una aceptación anticipada de la promesa requerida” (Echeverría, 2003, p. 57).

promise at all. If the conditions of satisfaction from the person who asks the petition are met, it means that the promise has been completed.

Offers¹²

Offers are conditional promises and they only happen when the receiver accepts them. The *offer* becomes a *promise* when it is accepted. If the promise is *accepted*, it needs to be completed. *Petitions* and *offers* are both linguistic movements which open the possibilities to generate promises and fulfill them. *Promises* are successful when they are completed within the agreed terms regarding time and elements of satisfaction. *Promises*, either made through *petitions* or *offers*, happen in all academic, work, and life environments. *Promises*, in personal and organizational contexts, exist when there is sincerity and competence. In the context of the OoL, these two terms show that the commitments individuals make must be coherent with the behaviors and conversations made publicly and privately, and with the ability to ensure that the promised things can be fulfilled in time. Therefore, trust is an element that is essential to this process.

Judgement¹³

¹² Description interpreted from the following excerpt: “Las ofertas son promesas condicionales que dependen de la declaración de aceptación del oyente. Cuando hacemos una oferta aún no hemos prometido nada, sin son aceptadas, la promesa requiere cumplirse” (Echeverría, 2003, p. 57).

¹³ Description interpreted from the following excerpts: (1) “Los juicios son como veredictos, tal como sucede con las declaraciones. El juicio siempre vive en la persona que lo formula” (Echeverría, 2003, p. 64); (2) “Con los juicios creamos una realidad nueva, una realidad que sólo existe en el lenguaje. No describen algo que existiera ya antes de ser formulados. La realidad que generan reside totalmente en la interpretación que proveen. Ellos son enteramente lingüísticos” (Echeverría, 2003, p. 64); (3) “Los juicios requieren un compromiso social adicional, que no es necesario para todas las declaraciones. El compromiso es que los juicios estén « fundados » en una cierta tradición. Por consiguiente, los juicios no son solamente válidos o inválidos; también son « fundados » o « infundados » dependiendo de la forma como se relacionan con el pasado” (Echeverría, 2003, p. 66); (4) “Los juicios nos permiten anticipar lo que pueda suceder más adelante. Con los juicios « fundados » podemos entrar al futuro con menos incertidumbre, con un sentido mayor de seguridad, sabiendo lo que podemos esperar y restringiendo el rango posibles acciones futuras” (Echeverría, 2003, p. 66); and (5) “Los seres humanos somos generadores incesantes de juicios. Los hacemos todo el tiempo y sobre prácticamente todo lo que observamos. Somos máquinas en permanente emisión de juicios” (Echeverría, 2003, p. 67).

The last linguistic element that shapes reality and that creates a future is the one called *judgement*. This *linguistic act* belongs to the category of *declarations* because they create a new world and environment. *Judgements* could be understood more like verdicts, and they also describe the person who formulates them. *Judgments* allow individuals to create new realities which reside in the language itself. *Judgments* are *declarations*; however, not every *declaration* is a *judgement*. If an individual says, « The office environment is toxic », the statement describes how the observer understands the environment where they work; it thus reflects his conception of the world, and his definition comes from his own concepts and feelings about the particular space that he is describing. This particular statement has to be validated because it may not happen the same way for others. *Judgements* can be valid or invalid, much like *declarations* are, and that distinction depends on the authority that the person has when they make them.

Judgements require an additional social commitment to provide relevant information to support them. Every *judgement*, to be relevant and feasible, must be well-founded or justified in evidence that supports how the observer interacts with specific information. *Judgements* will not only discuss past actions or events, but they can also describe how the future might be. When *judgments* are based on reliable evidence or information, individuals can move into more certain environments. For instance, when the CEO of a company says, « Next year our organization will experience between 10-12% of growth because our products now are selling 43% more than previous years », the statement is based on facts and numbers. The certainty of these facts allows the organization to continue flowing and working, while being confident of the future results. Human beings are constant generators of *judgements* in every sphere of our lives.

Orders of Learning

In continuing to discuss the OSAR Model, the concept of *first-order learning* focuses solely on changing actions and expecting different results. Changing the actions will affect the results, but not how the individual sees the world. The change might be effective, but the inner structure of thinking and making sense of the information will not experience change. The *second-order learning* or *transformational learning* occurs when the individual is faced with new interpretations of actions, behaviors, and thoughts. A person that consciously evaluates these elements and acknowledges how they affect their routines will become aware and be more present. The transformation will occur when the observer moves from his previous concepts to new and more functional ones, and then to their present circumstances.

Turning Points

It is common to see observers experience what the OoL calls « quiebres » – which translated means *turning points* – because their particular concepts, interpretations, and distinctions are different. These *turning points*¹⁴ are *judgements* that happen in life when we expect different things to happen. Judgements reside in the observer and they are therefore responsible for establishing and solving them. Different observers might have different *turning points* because every person will see things differently, and some of

¹⁴ Description interpreted from this excerpt: “es una interrupción en el fluir transparente de la vida” are an interruption in how life naturally flows. When a ‘turning point’ appears, the OoL states that “involucra un juicio de que aquello que acontece, sea ello lo que sea, no cumple con lo que esperábamos que aconteciera. Un quiebre es un juicio de que lo acontecido altera el curso esperado de los acontecimientos” (Echeverría, 2003, p. 110).

them will not come to the same *judgment* in a particular situation. It is important to notice that a *turning point* is not a problem; it is merely a different way of observing. When an observer says, « I am going to stop, I cannot work with this information because it is too complex to use », « Stop! », or, « I feel inadequate to this job », it only reflects that *turning point* to that particular observer, since they are not working like they should in their life. When an observer declares a *turning point*, a new space of possibilities emerges. From this new space, observers build new spaces to live and learn. *Turning points* can be positive or negative depending on how observers describe them; a positive one could be, « From now on, no more jobs like this », while a negative one might sound like, « This divorce will ruin my life forever ».

Listening

Thus far, the OoL has identified the different concepts and *linguistic acts* that describe how observers talk in their daily interactions; therefore, these *linguistic acts* happen inside the conversations. Individuals hold public and private conversations all the time, both in their personal and professional environments. In these two kinds of conversations, coherence between language, corporality, and emotions inform how every person's interaction functions and the amount of success they have with their goals. In organizational settings, coherence is essential, especially in leadership positions that require the modelling of successful behaviors to accomplish specific objectives and to frame how subordinates and coworkers must assume the organizational culture to act in accordance. For the OoL, a conversation is a dance between talking and listening. When discussing conversations, it is important to consider the emotional state in which the communication takes place. If both the sender and listener are not open to understanding

each other, the agreements will not be as efficient as they should. The OoL insists on the coherence between emotionality, language, and corporality in conversations; these three elements play a crucial role because if the emotional state of people engaging in conversations is not centered and calm, no matter how adequate the language is, the conversation will not be effective. To effectively have this conversation, then, there should be mutual respect. There will always be a conversation that will assist the observer in any *turning point* that manifests in their life; however, the key aspect of any conversation will be to develop the right listening skills.

For Echeverría (2003), listening is the skill that validates what is said in the oral form. As mentioned earlier, people will communicate using various forms of *affirmations, declarations, and judgements*, and because we live in collective environments and we are linguistic beings, listening becomes crucial to pass on messages and enhance the transformative learning process. The OoL highlights listening skills as the primary function to ensure the messages delivered by any person receives the right interpretation and allows people to transform in safe and caring environments. “Listening is the most important skill in human communication” (Echeverría, 2006, p. 74) and as leaders, workers, and clients inside organizations speak, listening is present at all times. Within an organization and educational setting, the most important skill to train is listening because it is the one that will validate the efficacy of the spoken communication. To listen is to interpret what the other person is saying; Echeverría (2003) says that, “listening = perceiving + interpreting” (p. 80) – when a person is talking, the job of the listener is to make sense of what the other is saying.

However, as was mentioned earlier, every observer will see the world from their own distinctions, and that lens will then filter what the interlocutor is trying to express. Thus, the thoughts expressed might not be the same as what the listener is understanding from their personal judgements. Every person will be an, “autonomous source of sense making” (Echeverría, 2003, p. 88), and there are as many interpretations as people and “the sense of what the listener gives to what was said by the speaker never equals to the sense that the own speaker gives what it says” (Echeverría, 2003, p. 89). The implication here is, that there will always be a considerable distance between the listener and the receiver; so, every participant in a conversation must learn to acknowledge and respect the differences and by recognizing the existence of that gap, the listener must learn to create questions to verify what they have listened to. To listen is to open oneself up to others, be humble, and avoid disqualification (Echeverría, 2006).

The OoL, when describing the listening process, suggests there are four levels of understanding effective listening. The first is the *sense-making of the words*: what they mean, and why every person selects them to describe something. The second is the *concerns of the speaker*, since every person talks from their concerns and point of view. The third is centered in the *coherent structure of the speaker*, which includes language, corporality, and emotion, and finally, the fourth is learning to *listen with compassion*. To listen competently will ensure quality relationships are formed and maintained in the workplace as well as in personal settings. The transformational learning process will occur invariably when the observer listens openly and carefully, putting their *judgements* aside, and allowing others to transform themselves with their words.

When developing linguistic skills, there are two phenomena of speech to consider: *proposition* and *inquiry*.¹⁵ When the observer talks, they will invariably be standing in one phenomena or the other. When *proposing*, the speaker will share any *linguistic acts* such as *petitions* or *promises* and even experiences or opinions; while *inquiring*, however, the speaker will offer a space to safely listen to what the observer has to say.

The OoL has observed that in training sessions focused on the improvement and development of soft skills, either delivered by internal HRD specialists or external consultants, facilitators try to show that by acquiring certain specific behaviors, phrases, and models, people will immediately see how they can incorporate these new and/or different elements and modify how they behaved before. However, little is said about modifying the root cause of the thought or interpretation that is preventing the observer from moving forward.

Human Resources Development (HRD)

Organizations are, “social entities that are goal-directed, are designed as deliberately structured and coordinated activity systems, and are linked to the external environment” (Daft, 2013, p. 12). Organizations are made up of people and their relationships with one another (Daft, 2013). For Echeverría (2003) organizations are, “a linguistic phenomena, units built from specific conversations which are based on the ability of human beings to carry out mutual commitments when they talk to each other” (p. 47). Organizations are a stable network of conversations, and three aspects must be considered to understand them better:

¹⁵ Description interpreted from the following excerpt: “un individuo relata sus experiencias, emite opiniones, sugiere determinados cursos de acción, toma decisiones, efectúa peticiones” (Echeverría, 2016, p. 133).

First, the limits of organizations are linguistic; second, the structure of the organization is built as a network of mutual promises and, finally, the organizational culture is based on the shared meanings in people's conversations. (Echeverría, 2003, p. 147)

Apart from being networks of conversations, organizations in the 21st century are based on knowledge more than manual skills or physical labor, like in the scientific management era (Pugh, 1997). During this era, workers were trained to be an extension of a machine. Frederick Taylor (1912, a theorist of this time frame, noted that workers should follow a series of small tasks to accomplish their goals; they must be trained to do a part of the process, establish a clear division of responsibilities between managers and workers, and assume their role of thinking about and executing this task appropriately (as cited in Pugh, 1997). Therefore, organizations in this era turned into bureaucratic institutions with, “very impersonal, minimizing irrational personal and emotional factors and leaving personnel free to work with a minimum of friction or confusion” (Owens & Valesky, 2015, p. 80).

As time went by, organizations started noticing the value of talent and learning to achieve objectives. Peter Senge (1990) states that organizations are places where people learn and, “superior performance depends on superior learning” (as cited in Pugh, 1997, p. 486). Organizations that learn revolve around processes like *personal mastery* (continuous learning); *mental models* (patterns of thinking); *shared vision* (the future goal); *team learning* (through dialogue or discussion); and, *seeing the organization as a whole*. (Senge, 1990). The ultimate goal for Senge (1990) is to create organizations, “where people continually expand their capacity to create the results they truly desire,

where new and expansive patterns of thinking are nurtured, where collective aspiration is set free, and where people are continually learning how to learn together” (p. 3). The idea is to move organizations beyond linear analytic thinking and find a common and shared vision that aligns everyone towards the same direction (Harris, 1990).

The shift from thinking about organizations as mere places to produce something to a learning environment was also studied by Peter Drucker (1954), who states that “organizations produce non-products or services but, rather, value proposition” (as cited in Wallman, 2008, p. 65) and to get to that point, organizations must have internal conversations discussing their mission, vision, types of products and services, values and principles, clients, market, and goals, among others. Some tools help organizations to start conversations about how to set the course of future actions and make sure everyone is on board. To understand these aspects, a SWOT analysis is a tool widely used, which studies strengths, weaknesses, opportunities, and threats to an organization both internally and externally. This tool is commonly “used as an assessment tool for businesses to organize information, identify issues, determine solutions, and suggest opportunities” (Harmon, 2016, p. 1). Here, *strengths* and *opportunities* constitute internal factors, and the *weaknesses* and *threats* constitute external factors.

Organizations are spaces of constant transformation, and employees, as adult learners, are in charge of adopting new ideas, learning new processes, and achieving challenging goals to keep the business competitive. Adult learners, as employees, must regularly prepare to master any aspect of a job, and training programs should be in place to provide the necessary knowledge for the future (Paskewich, 2015); Drucker (2010) believes that the, “formation of people needs to be carefully examined and applied, the

formation could occur through an organization providing training programs, through the organization's culture, or through some outside source" (as cited in Paskewich, 2014, p. 661).

Echeverría (2000), in his studies about organizations, mentions that every job needs knowledge, and this only can be provided through training exercises. Organizations divide their functions into different areas to ensure that the appropriate attention and focus is given to the goals that need to be achieved in specific time frames. The duty of Human Resources Development (HRD) has moved from just hiring and organizing employees to now promoting strategies related to work-life balance, diversity, literacy, and most importantly, to ensure the alignment between people and business goals (Drucker, 1999). The role of this department is to accompany the change management process through initiatives such as training, organizational development, and coaching. Human Resources practitioners require information from the business to design the appropriate learning spaces for the development of coworkers and, therefore, the fulfillment of organizational goals (Secord, 2003).

Organizational Culture

Organizational culture, which plays a crucial role in the learning experiences inside organizations, is defined as,

A pattern of shared basic assumptions learned by a group as it solved its problems of external adaptation and internal integration, which has worked well enough to be considered valid and, therefore, to be taught to new members as the correct way to perceive, think and feel in relation to those problems. (Shein, 2010, p. 18)

Culture goes hand-in-hand with the way the organization works, how they create their rules and regulations, how they recruit, and the values and principles they seek in others to ensure success. *Organizational culture* is one of the factors clearly linked to successful performance and leadership practices (Schein, 2016). A more recent view of *organizational culture* is provided by Geert Hofstede (2017), who defines it as, “the way in which members of an organization relate to each other, their work and the outside world in comparison to other organizations” (p. 1). Culture is also found in people’s conversations inside organizations (Echeverría, 2006) and through them, values are shared, leading to the development of trust which links how people commit to and work towards the company’s goals.

Leaders and Managers

Organizations are formed by people who are distributed in different roles and with different responsibilities. There are leadership positions in all organizations; Drucker (1954) considers the *manager* to be, “an entrepreneur who attempts to create exchanges in order to reach organizational objectives” (as cited in Wallman, 2008, p. 62) and Ken Blanchard considers a *leader* to be the one capable to influence others by unleashing the potential and power of people and organizations to achieve greater good (Blanchard, 2010). Both terms inform the role that organizations need to achieve results and that is why the manager is an organizational role that companies cannot live without (Pastewich, 2014). Therefore, this role is essential in the fulfillment of goals and objectives. For the OoL, managers work using the power of language, and with it, they motivate, teach, punish, and guide others in pursuing their goals. Using this power, they make decisions and solve problems (Echeverría, 2000).

For Bass and Riggio (2006), *transformational leaders* are, “those who stimulate and inspire followers to both achieve extraordinary outcomes and, in the process, develop their own leadership capacity” (p. 3). This leadership style, “inspires followers with challenge and persuasion, providing both meaning and understanding (Bass & Riggio, 2006, p. 5). To ensure that transformation happens, three components must exist to allow transformation to happen: *motivation*, assisting people in their growth; *morality*, forging congruence between the organization and what the leader preaches; and *empowerment*, related to autonomy in the employee’s functions. (MacGregor, 2003). Essentially, a leader is, “an individual who significantly affects the thoughts, feelings, or behaviors of a significant number of individuals” (Gardner, 1995, p. 8) and their role inside a company is to advise, support, facilitate, and allow the team members to fulfill their work (Echeverría, 2006). Leaders are also coaches, and they have distinctions and competencies that another person does not have; therefore, when working with others, leaders assist them in the transformation of their inner self (Echeverría, 2006). The conversations inside an organization that are held between leaders and subordinates inevitably shape how skills are developed, either by example or by formal and/or informal instruction.

HRD departments are typically responsible for the training of *technical skills* – work-related like software and machines – and *soft skills* – related to people and interactions – to ensure successful outcomes in the employees. *Soft skills* have a human approach; Alles (2005) notes that they are, “the characteristics of personality that are based on behaviors which generate a successful performance in a job” (p. 12). For Anderson (2014), *soft skills* are traits that affect a person’s ability to interact effectively with coworkers and customers (p. 13).

Soft skills can be applied and trained in different contexts; there is rarely, if ever, a universal ‘best way’ to proceed. Nowadays, skills commonly found in almost all businesses are leadership, communication, teamwork or collaboration, communication, innovation, problem-solving or conflict management, negotiation and, strategic planning/thinking (Adams, 2014; Alles, 2005; Anju, 2009; Henville, 2012; Robbins, 2001). However, every company develops or adapts their own set of key skills to ensure every position and employee receives the right training.

Organizations are spaces within which to establish conversations that matter and between leaders and employees the development of skills happens constantly through individual and collective work and by receiving guidance of people whose experience is more advanced. To enhance effective conversations inside organizations and example of an expanding technique all over the planet is the World Café. This can be an option to take, since it promotes the use of collective intelligence that, when shared with colleagues and peers, enhances the possibility to solve any situation in the organization (Brown & Isaacs, 2005). This technique, spread widely around the world, states that there are seven steps to promote effective conversations:

- (1) Set the context;
- (2) Create hospitable spaces;
- (3) Explore questions that matter;
- (4) Encourage every one’s contribution;
- (5) Cross-pollinate and connect diverse perspectives;
- (6) Listen together for patterns, insights and deeper questions;
- (7) Harvest and share collective discoveries.

Transformative Learning

The term *learning* is found across the adult education literature and because this paper is focused on adult learning, I will consider Jack Mezirow (2005) as the leading author in adult education. He states that *learning*, “is understood as the process of using a prior interpretation to construe a new or revised interpretation of the meaning of one’s experience as a guide to future action” (p. 5). This aspect shows that adults, “need to understand and order the meaning of the experience, to integrate it with what we know to avoid the threat of chaos” (Mezirow, 2000, p. 3). Mackeracher (2004), on the other hand, focuses on the sense-making aspect, acknowledging that learning naturally evolves and transforms the adult learner:

[Learning is] a process of making sense of life's experiences and giving meaning to whatever ‘sense’ is made; using these meanings in thinking, solving problems, and making choices and decisions; and acting in ways that are congruent with these choices and decisions as a means of obtaining feedback to confirm or disconfirm meanings and choices. (p. 8)

The transformational aspect of learning is defined by Crow (1965), as cited in Knowles, 2012), as he points out that,

Learning involves change. It is concerned with the acquisition of habits, knowledge, and attitudes. It enables the individual to make both personal and social adjustments. Since the concept of change is inherent in the concept of learning, any change in behavior implies that learning is taking place or has taken place.

Learning that occurs during the process of change can be referred to as the learning process. (p. 12)

Learning, then, is an activity that happens naturally and the process accompanies every human being's life. When a person is exposed to new information that challenges previous beliefs, thoughts, or insights, often a reflective, learning, and transformational process begins. Therefore, the term *transformative learning* in an educational setting refers to,

The process by which we transform our taken-for-granted frames of reference (meaning perspective, habits of mind, mindsets) to make them more inclusive, discriminating, open, emotionally capable of change, and reflective so that they may generate beliefs and opinions that will prove more true or justified to guide action. (Mezirow, 2004, p. 8)

Connection to Adult Learning

Malcolm Knowles (2012), the father of adult education, coined the term *andragogy* to refer to the discipline which focused on the teaching and learning of adults. He defined five basic assumptions about these type of students, and noted that adult learners are self-directed and bring experiences with them to share in the learning environment. He further noted that adults are ready to learn, problem-oriented, need to see the immediate application of what they are learning, and are motivated by internal factors (Knowles, Holton, & Swanson, 2012). These elements define the general characteristics that all adult learners share, regardless of the learning environment.

The role of the facilitator, then, is to confer particular attention to these points when creating lessons and materials to ensure that the topics that have to be learned or practiced are carefully selected and designed.

In contrast, Liderman (1960, as cited in Knowles, Holton, & Swanson, 2012, p. 38) states that adults are, “motivated to learn as they experience needs and interest that learning will satisfy, adult’s orientation to learning is life-centered, experience is the richest source of adult learning, Adults have a deep need for self-directing, individual differences among people increase with age.” These two points of view show that self-directedness, motivation, and problem-oriented learning are important considerations for educating this population, and that these should be addressed inside educational settings to promote the learning of adults.

Transformative Learning Concepts and Practices

The learning process in adults has been discussed either from a behavioral or constructivist approach by many scholars including Mezirow (1997, 2000), Knowles, Holton & Swanson (2012), and Skinner and Pavlov (as cited in Merriam & Bierema, 2013). In the literature, four common themes arise and are relevant in understanding how to create relevant learning experiences:

- (1) The curriculum has to be built around the needs and special circumstances in which learning is happening for adults (Knowles, 2012);
- (2) The facilitator’s role must be centered on creating spaces for inquiry and curiosity rather than the passive transferring of information (Knowles, 2012; Mackeracher, 2014);
- (3) Experience is one of the valuable resources that adults carry and is buildable and adaptable, and should be taken into consideration when designing learning spaces and materials (Cranton, 1997; Knowles, 2012; Mackeracher, 2014; Mezirow, 2000);

- (4) The resources and materials created by the facilitator must inform the need and expected outcomes of the learning process, as well as the reason why the training/learning process is happening (Cranton, 1997; Dotchy, et al, 2011; Knowles, 2012; Mackeracher, 2014; Mezirow, 2000).

For Mezirow (2000, as cited in Brock, 2010) there are ten steps that should be followed to lead adult learners to a different perspective of the world. These steps are:

- (1) Disorienting dilemma;
- (2) Self-examination of feelings of guilt or shame;
- (3) Recognition that one's discontent, and the process of transformation, are shared and that others have negotiated a similar change;
- (4) Exploration of options for new roles, relationships, and actions;
- (5) Critical assessment of assumptions;
- (6) Provisional trying of new roles;
- (7) Planning a course of action;
- (8) Acquisition of knowledge and skills for implementing one's plans;
- (9) Building competence and self-confidence in new roles and relationships;
- (10) Reintegration into one's life on the basis of conditions dictated by one's new perspective.

Evidence that conversations and language are needed in adult learning appear with the concept of *discourse*. Mezirow (2000) defines *discourse* as, "the process in which we have an active dialogue with others to understand better the meaning of an experience" (p. 14) The ideal conditions for *discourse* are that everyone has an equal chance to participate and all participants must be informed of the topic that will be addressed, participate in active listening, and take turns.

Discourse seeks for an understanding to reach reasonable agreements. Echeverría (2003) mentions that dialogue and conversation are the most relevant element to transform words and meaning into new behaviors and thoughts that would redefine the learning and growth experiences.

The next important term is *frame of reference* which refers to a, “habit of the mind and resulting points of view” (Mezirow, 2000, p. 17) A *habit of the mind* is also a set of assumptions and or oriented predispositions that act as a filter for interpreting the meaning of a given experience; some habits might be found in contexts like sociolinguistic (norms and customs), moral-ethical (values, moral norms), philosophical (religion, spirituality or trascendental world views), or psychological (personality, esteem, self-concept) (Mezirow, 2000). *Frames of references* can be compared with the concept of *judgment* in the OoL, since both come from social contexts or preconceived ideas. To transform a *frame of reference*, it is necessary to modify *habits of the mind* and this is only possible through critical reflection and modification of *points of view*. Once this modification happens, the main goal in adult education, which is to become autonomous, responsible thinkers (Mezirow, 1997) is achieved.

For Mezirow (1997), *autonomy* refers, “to the understanding, skills, and disposition necessary to become critically reflective on one’s assumptions and to engage effectively in discourse to validate one’s beliefs” (p. 9). Furthermore, becoming *critically reflective* “is the key to transforming one’s taken for granted frames of reference” (Mezirow, 1997). Halen-Faber (1997) complements this notion by stating that this type of critical thinking challenges the concepts learned in other settings and at different stages in an individual’s life. *Transformation* “refers to a movement through time of reformulating structures of meaning by reconstructing dominant narratives” (Mezirow, 2000, p. 20); when adult learners become critically reflective of their assumptions and are aware of the context in

which they live, their *discourse* and interaction with others leads them to a more dependable adult life because they make sense of the experience (Mezirow, 1990).

In the adult learning field, learning happens when students make sense and get the meaning of concepts and ideas (Mezirow, 1990). *Interpretation* plays an important role in the learning process, and as Echeverría (2003) notes, *interpretation* is the culminating activity in the listening and understanding of information process. Facilitators, then, must consider that their adult students will ask for learning environments where the six assumptions by Knowles (2012) are met: (1) self-directedness; (2) the need to know; (3) the use of experience in learning; (4) a readiness to learn; (5) an orientation to learning; and (6) internal motivation. *Andragogy* and *transformative learning* both explore more about the learning environment and conditions to learn, whereas the OoL is mostly concerned with the linguistic interactions and the use of language to transform one's experience of learning and growing.

Transformative learning theories discuss the process of acquiring information and knowledge on any topic that adults need; however, they do not indicate how the process happens when training soft skills inside organizations. When training adults, the role of the facilitator can make a significant impact on how students perform. The andragogical model of making sense and meaning developed by Knowles (2012) indicates that the role of the facilitator should expose students to new possibilities of self-fulfillment, and clarify the student's behavior and expectations, their level of aspiration versus their level of performance, and the life situations they currently experience. Here, soft skills in the workplace can be developed if the facilitator understands the skills to be trained and the desired outcomes expected by every person.

Andragogy and *transformative learning* theories explore the role of learning in traditional settings where the instructor and the student meet one-on-one to learn, but online learning is now also a possibility that is being explored by organizations. The concept of *digital andragogy* is, “the practice of educators to equip and encourage adult learners to choose and use the affordances and accessible digital technologies to personalize their learning” (Blackley & Sheffield, 2015, p. 408). This learning environment, “offers numerous opportunities for interaction through emails, online discussion forums, blogs and posts on social media and collaboration tools” (Mehta, Makani-Lim, Rajan, & Easter, 2017, p. 118). Facilitators must acknowledge that some adult learners might experience difficulties when using software or learning platforms; therefore, instructors must always know the particular needs of their groups and prepare materials according to their level of understanding of technology to promote familiarity.

After the learning experience has been completed, evaluation is a relevant part of the learning experience. The Kirkpatrick Model (Paull, Whisted, & Girardi, 2016) shows that there are four levels of evaluation:

- (1) *Reaction*, to see how participants feel after the training;
- (2) *Learning*, to validate that the learning objectives were met;
- (3) *Behavior/Transfer*, to measure that the participants behavior has changed after the experience; and
- (4) *Results*, the overall aims of the training were achieved – in organizational settings, this can be referred as Return of Investment (ROI).

Conclusion

Overall, the literature shares how the OoL was developed, the key terms and ideas and the impact it has on the HRD field regarding the creation and delivery of corporate training materials. The impact from new research, technology and teaching techniques are elements that inform the learning experience for adults inside organizations.

CHAPTER THREE: METHODOLOGY AND RESEARCH DESIGN

The purpose of this handbook is to provide resources for facilitators in the development of training materials. These training materials are focused on the creation of conversational spaces where people can understand how they are learning new skills or perfecting the ones they already have. This topic is particularly relevant since my connection to training has existed for over a decade. The training experience has always reflected in employees' performance and, therefore, on their personal and professional growth.

My Personal Interest in the Study

My research interest in the subject of the use of language, as well as the philosophy of it, started when I discovered the deep connection between meaning and action and how those two elements play a definite role in helping others acquire new knowledge and put it into practice. The following passage explains my story.

For the past 10 years, I have collaborated in Human Resources Development (HRD) departments in Mexican and international companies. The biggest attention and concern in those organizations was always directed towards the training area. In all companies, no matter their industry, the main difficulties were always focused on four main aspects and indicators:

- The development of adequate materials to ensure that all employees were receiving proper knowledge for their daily job activities, either on the technical side (knowledge in their field) or the behavioral side (competencies and soft skills);

- On the executives and the people in charge of running the organization.

Typically, they would need particular attention since the primary focus was on finding ways in which they would feel engaged and participate in their learning and in developing competencies. This was because it was common to see that they were not willing to receive training, much less to attend seminars, discussions, or debates inside or outside the organization. This population needed to be updated mainly in their leadership skills because a lot of executives and managers still follow old practices that are not allowing young generations to feel welcomed and open to innovation;

- Development and delivery of content. The material created for every course was often outdated and disengaging, with no new ideas to promote critical thinking. Further, it was mainly delivered using PowerPoint slides and a few activities that everyone already knew. Facilitators had to find more creative ways to train different audiences either through online platforms, teambuilding activities outside the organization (to transfer concepts like teamwork or negotiation into live activities or simulators that enable them to experience the transference of knowledge), face-to-face teaching in a classroom, or by one-on-one interaction;
- The economic side of the training process. Facilitators and HRD leaders and managers had to show a Return on Investment (ROI) of the training events and also, a positive increase in indicators such as profit, customer service, productivity, new clients, new products, and market share.

With these aspects in mind, the creative teams in charge of training inside organizations have to come up with strategies to target those indicators, but also focus on the needs of the employees. For the technical side of training, the wise thing to do was

always to send the employees to be trained by experts in different topics like programming systems, new technologies, finance, accounting, laws, regulations, specialized medical training, and many other areas. For the competencies and skills required to perform inside the organization, such as human skills, competencies, and values appreciated by the company, the story was not that easy. For the most part, the job had to be done internally by the HRD team of facilitators and instructional designers. Our challenge was to create content and materials that were relevant, engaging, useful, and easy to apply in employees' routines with others. After years of delivering all sorts of topics to adult audiences and becoming an expert in handling complicated, as well as enthusiastic, students, I found two reasons as to why people do not use what they learn in these kinds of training sessions. No matter how hard I tried to provide the best quality of materials, fun simulators and activities, and to bring in different subject experts, people always:

- Ended up not becoming critically reflective of the material and eventually forgot the purpose of the course, as well as the ideas that had to be transferred to the day-to-day job responsibilities and projects. Students often wrote in the feedback evaluations that what scholars and philosophers had said was going to be very hard to apply and master.
- The learning cycle (icebreakers, introduction, topic and theory, activities, feedback) became boring and with nothing new to expect. This happened with on-site facilitators and also with consultants or experts from other places that came to participate and teach different subjects or topics.

With this continual cycle, the challenge I had was to ensure that the investment made in training was effective and ideal for every person. To do that, I started incorporating techniques learned from the Ontology of Language (OoL) and trying new activities where the use of language and meaning was the centerpiece of reflection. To center some of the training events on meaningful conversations led me to a new experience where the response from both leaders and employees was to adopt the concepts reviewed because they became active participants in the construction of their own knowledge. Later on, I developed team-building experiences, online material, videos, tours around cities, simulators, board games, dancing lessons, cooking classes, world cafes, virtual reality games, and so on, just as a medium to engage collective intelligence and built on a given topic based on everyone's previous experience. By doing this, the training session became a training experience in specially designed spaces. Somehow, after a few months of trying new techniques, the indicators mentioned earlier kept moving slowly up; people behaved progressively better and cooperated better in group work activities.

From Theory to Handbook Creation

The exercises, handouts, and materials included in the handbook are entirely created from scratch using the OSAR model and linguistic distinctions and concepts like *frames of reference* and *critical thinking*, using these understandings as a base to reinterpret how knowledge is typically delivered, which is by giving information to the students in a classroom. The idea of merging OoL and *transformative learning* theories was first to promote in the facilitator the ability to understand how to touch the observer's *judgments* and *declarations*, and facilitate sessions with a critical thinking approach. By

doing so, the effectiveness of the learning experience can significantly change the participant because the new conversations held will move the observer from a passive place to a reflective mode. Teaching observers the distinction between the first and second order of learning allows them to step back and question themselves about the next actions to solve a specific situation or how to approach them and have more thoughtful conversations, either private or public. Language holds the power to shape reality and the educational process inside organizations can assist in the accomplishments of goals, but most importantly, it assists in the interactions of people who effectively manage collaboration.

Facilitators hold a relevant position inside organizations. The handbook is a tool that can be used as a guideline to produce better materials and delivery in every course that employees need to take. By following concepts and research done in the fields of adult learning, instructors will produce conversations that allow new interpretations of the reality in which the organization lives. The critical thinking process that conversations produce will shed light on the issues faced at any moment in the organization; to accomplish this, facilitators will provide sets of questions that inevitably encourage people to search for different understandings about how their skills can assist them in achieving their goals and the way they see the world.

In my work as facilitator and instructional designer, the recent use of questions and conversations has allowed me to see the benefit of transforming the employees' perspectives to promote growth. Questions, feedback, and the inclusion of exercises that challenge previous beliefs in any skills program has increased the success of my own training events. Employees reported more confidence and engagement in the

conversations they had because they repeatedly noted that, ‘they became relevant in the *process*’ – not just in the topic or techniques they were required to learn.

CHAPTER FOUR: HANDBOOK

The handbook which follows is the culmination of a practical application of the theories outlined in Chapter Two for training and development practitioners to use in their daily work. It has been embedded within this Major Research Project (MRP) but can also be produced as a stand-alone handbook to distribute among practitioners.

For the purposes of embedding the handbook within this MRP, page numbers of the handbook (as its own distinct entity) are listed in the Table of Contents in Chapter Four. However, the numbering within this MRP will remain sequential throughout the entire document.

Handbook

A Transformative Learning Experience in Today's Organizations

Developed by: Cecilia García Vega

Brock University, 2017

Dear facilitators,

We have the pleasure to be the promoters of change inside organizations. It is our duty to find the best materials, techniques, and resources to make learning an exciting process that increases the possibilities of success for every person and, therefore, for the organization.

Organizations, now more than ever, have the privilege to be places where people find a space to put to practice their skills and shape new habits that inevitably will have an effect on their personal and professional lives on a long-term basis. Therefore, we as facilitators must take the learning process as a serious matter and always keep learning about new techniques and resources that can enhance the experience positively for our coworkers and clients.

The purpose of this handbook is to share how the Ontology of Language (OoL) can enhance the transformative learning experience inside organizations with lasting effects. By studying this philosophy and combining it with transformative learning concepts, the learning experience will, hopefully, assist employees in their achievement of goals but, most importantly, in their behaviors – no matter where they go.

We must know that the learning experience includes aspects like the learning environment, the design of learning objectives and goals, adequate materials, examples and exercises, and questions to promote critical thinking and allow the student to be an active participant in their learning experience. Learners inside organizations hold different positions, responsibilities, knowledge, and expertise, and this is an asset when designing learning sessions. The learning experience is enriched the minute the facilitator uses every possible resource available inside the organization. These resources range from collaboration groups to the sharing of lessons learned, online feedback groups, problem-solving activities, puzzles, reading materials, and so on.

What must prevail in the mind of the facilitator is the purpose of developing knowledge and skills that will accompany the individual in their work journey. These skills will shape how the person performs and grows. Most of the work done in an organization is through conversations; when employees learn how to talk and listen better, they will open the world full of new possibilities because they can share their thoughts and receive feedback in safe spaces where common goals are understood and shared. The learning process then will be constant and active no matter the position level or role.

My hope is that in the next pages, you will find activities and ideas that will help you create the best training materials that your organization needs. Be creative and don't be afraid to explore new techniques and resources.

Regards,

Cecilia García Vega

*Dedicated to all facilitators
whose intention is to make any organization
the best place to work and grow.*

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INTRODUCTION

The present handbook will support the training process inside both organizations and consulting firms which aim to develop materials that include concepts from Ontology of Language (OoL) and transformative learning theories. This effort constitutes the first handbook merging both disciplines and assisting the transformative learning process for adult learners. Inside organizations, the leading process that help in the learning and growth process, as well as the fulfillment of goals, is *the conversation*. Therefore, by designing productive conversations and encouraging them in the workplace, employees can become aware of the quality of their interactions, as well as their own private and public conversations, to ensure that they are meeting the goals expected for the position they hold.

This handbook will provide the relevant concepts that emerge from OoL and transformative learning theories, using organizations as the context within which exercises and activities can be implemented – exercises and activities that will encourage leaders and employees to understand how they can develop soft skills through conversations. When working with dialogue, organizations, as a whole, can learn to work better in their active listening skills and allow their collective intelligence to show. By doing this, leaders and employees engage in transformative spaces full of different ideas and interpretations, that ultimately can promote change and growth for employees and for the organization itself.

HOW TO USE THE HANDBOOK

This guide provides suggestions and ideas for facilitators inside organizations that can make the learning experience a more lasting and significant one. The materials and ideas gathered here were specially created to cover different topics related to the development of soft skills. This manual can be used as a workbook starting from the beginning with the design, delivery, and assessment of training experiences, or facilitators can only use some exercises that they find helpful.

Throughout this handbook, facilitators can learn key elements from both OoL and transformative learning theories. These terms are detailed in Chapter One and examples are provided to clarify possible confusions. After detailing the concepts, in Chapter Two, facilitators will find different tools they can use to create interventions from the detection of deviations in skills, ranging all the way to the creation of materials to promote development in employees.

Facilitators can play with the exercises and combine them or adapt them to particular situations where timeframes, location, or the amount of people is different from a traditional setting like a classroom or an online webinar. Therefore, *A Transformative Learning Experience in Today's Organization* can hold a place in the development of training and the enhancement of any learning and conversational experience that takes place inside the organization to promote the development of soft skills among employees.

The handbook contains handouts and diagrams that can be used in training experiences as supporting material to gather thoughts and comments that are valuable for both the employees and the organization. When gathering new ideas, concepts, observations, and suggestions, facilitators can use that information to continue developing and adapting the necessary materials to assist in achieving their desired results.

CHAPTER ONE: ONTOLOGY OF LANGUAGE AND TRANSFORMATIVE LEARNING INSIDE ORGANIZATIONS

Ontology of Language (OoL) is the contribution that Rafael Echeverría (2003), a Chilean sociologist and philosopher, contributed to the philosophy of language field. With his work, facilitators, educators, and organizational coaches can develop new ways of enhancing transformative learning experiences and promoting lasting changes in people's behavior.

When OoL was developed, the word *language* used to be thought of as a way to describe and refer to objects and phenomena (Echeverría, 2003). It was not seen as a means to create new possibilities and enhance transformative learning experiences for adult learners. The way OoL works in both organizational and educational settings is by designing spaces where effective conversations take place and developing the listening skills required to interpret what every individual is saying. OoL works with a model that explains how transformational learning happens and what elements should be taken into consideration when designing a learning intervention. These elements are **results**, **actions**, and the **observer**. The diagram below, Figure 1, shows these interactions:

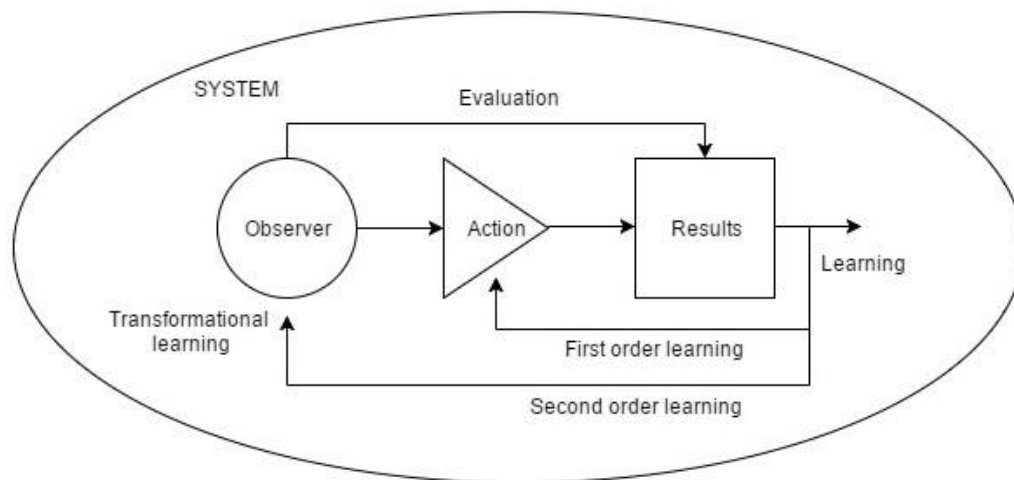


Figure 1. The OSAR Model.

For OoL, the *results* are the first aspect to be reviewed before any intervention happens. This will show what the person, group, or organization achieved in a specific time frame. The results are the ultimate indicator of success or failure, and they always

have to be measured with qualitative or quantitative indicators. The results only happen as a consequence of the actions that individuals and groups take to reach a specific goal. In OoL, people or individuals are called *observers* and they are responsible for the *actions* they take to accomplish any objective or goal. They perceive the world according to their particular set of *linguistic acts*, and these acts are separated into 6 different categories: *affirmations*, *declarations*, *promises*, *petitions*, *offers*, and *judgments*.

When talking or verbally expressing something to another person, every observer will use some kind of *linguistic act* to interact with someone else. These acts happen on their own or very often as a combination in conversations. Observers will always express their concerns and their description of the world in the way they see it according to the *distinctions* – meaning the different meanings they ascribe to events or things – they possess. In training exercises, facilitators must actively listen to every participant to understand what they mean, but also to be able to offer adequate feedback and promote the modification of behaviors towards the achievement of a goal. Let's explore the linguistic acts that happen in daily conversations.

Affirmations: This act reports what the person observes in the world, and evidence must be provided. An example would be, “The temperature today is 23°C, and I can verify this by using a thermometer, which everyone can see.” Affirmations are relevant or irrelevant, depending on the relationship they have with our concerns. The word *affirmation* does not, however, imply that everything said is positive.

Declarations: These acts change the reality in which we live. Declarations can be valid or invalid, and that depends on the power that the person has to say about them. They change the reality because after pronouncing them, life is different. When in a church, for instance, the priest says, “I pronounce you, husband and wife” – life will be different for the two individuals, but before pronouncing those words, that reality did not exist. Likewise, if a boss says, “You are fired” or, “You are promoted,” that also changes an individual's reality.

Promises: These acts appear constantly in our discourse. Promises are social commitments that involve a conversation between at least two individuals. Promises need 4 elements to become real: the listener, the sender, the condition of satisfaction of the promise, and the time frame. Promises require a declaration of acceptance from the

receiver to know that the agreed conditions were met. If a boss says, for instance, “Next month you will get your salary increased,” the employee (receiver) must check their monthly paycheck and if the raise happened, it means that the promise has been fulfilled. Organizations are full of promises: promises of work, of achieving goals, and of future commitments with clients to keep growing the company. Promises can be made either with petitions or offers. When promises are not fulfilled, the individual expecting certain actions to happen is entitled to demand an explanation or even to complain to clarify what happened and how it can be mended.

Petitions: These are linguistic movements that involve a receiver obtaining a promise from a sender. Questions could be a type of petition; an example of this can be, “Would you attend the meeting at my place if I get stuck in the traffic?” and the answer is “Yes.” When the petition is accepted, it means that there is a promise to be fulfilled. When the sender denies the petition, there is no promise at all.

Offers: Offers are conditional promises, and they only happen when the receiver accepts them. If one employee says to their coworker, “I will cover your shift tomorrow so that you can go to the doctor,” if the offer is accepted by the receiver, it means that now, a promise exists and must be fulfilled.

Judgements: This linguistic act lives in our daily conversations, and when observers use it, it shows clearly how they see the world. “Judgements are like verdicts, just like it happens with declarations; the judgment always lives in the person that formulates it” (Echeverría, 2003, p. 64). Judgments are linguistic; they create a new reality, and this reality resides only in the language. They do not describe something that existed before being formulated; they live entirely in the interpretation they provide. An example of judgement could be, “I think Anna is an extraordinary receptionist”: this reflects how the observer perceives Anna’s performance, but that need not be true for someone else because everyone sees things differently and with different standards. Another example is, “The food in this cafeteria is the worst”: again, that verdict will only apply for the way that particular person sees that place, but it could be different for someone else.

The linguistic acts above described happen all the time, everywhere. They are present in any type of conversation, in any language, and at any age and between all people.

In OoL, there are two types of learning. The first one is called *first-order learning* and in this, the observer or individual will only change the actions that are producing a particular result. This means that there will not be a modification of the behavior, only of the causes that produce a particular outcome. For example, let's say an employee in a consulting firm is not accomplishing the goal of completing 5 reports every month; he typically will need to spend time gathering information from all departments, and then the analysis and construction of the report will take him most of the time. This employee is feeling more frustrated as time passes, and his performance is decreasing. The cause of the problem is that he creates every report from scratch instead of designing a template to fill out with new information every month, which could save him over one day of work each month. Here, the *first-order learning* happens when that particular employee modifies the action that consumes unnecessary time, and consequently, his results improve due to that change.

The other type of learning is called *second-order learning*, and it happens when the observer changes their way of seeing every situation and, as a result, some behaviors change due to their different observation of the world. That same employee from the aforementioned example will have better results, for instance, if he creates a network with coworkers where they design a different workflow to ensure that the reports he makes a difference in how colleagues and peers see and follow processes and therefore, the leaders can make better decisions. In that case, the employee is now setting a new context to address his situation, and the solution comes when he sees everything from a different perspective; here, that employee is developing the skill of collaboration. *Second-order learning* thus demands a different observation of the world and a critical questioning of how a situation can be solved without using obvious and easy actions. Sometimes, the best results come when there is a different definition of the problem, rather than a change in the measure that produces an outcome.

Overall, the OSAR Model guides the learning process and assists facilitators and people to understand what is happening with their performance and how they are

accomplishing their goals. The model is dynamic and it can be used for a variety of training exercises, but also can be used to provide feedback and to establish conversations to understand where a problem lays and how to address it to ensure both personal and organizational success.

The model also allows for people to see how information flows in their organization, and further, what can be done to achieve transformational learning experiences. The key to that is, in fact, to modify how the observer sees the world and to allow the individual to seek other possibilities never before explored.

As mentioned earlier, every individual is an observer and they make sense of the world through language. However, two other elements play a major role in bringing coherence to conversations; they are *corporality* and *emotionality*. This diagram helps to explain the connection between the tree:

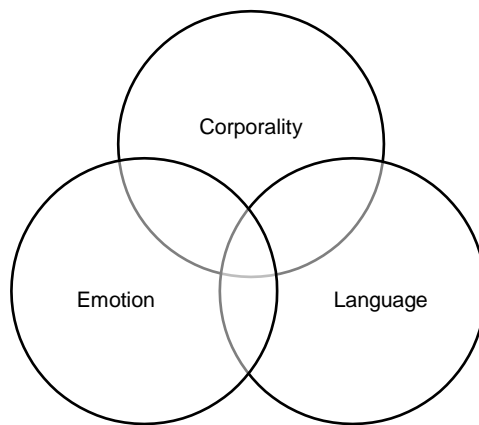


Figure 2. Corporality, Emotion, and Language.

Observers' views of the world will manifest mostly with the use of linguistic acts; but, it is relevant to note that the coherence structure in any individual is also shown through emotions and physical expressions. *Corporality* refers to, "the way people move, feel, sense, dance, run, and any other physical movements" (Echeverría, 2009, p. 164). Every observer has a particular way to move and interact with the environment, and corporality studies how the body reacts to the elements in the environment. The emotional component refers to the elements that reside inside individuals. *Emotionality* constitutes us differently as individual different observers with different emotional states

which predispose individuals to either observe or ignore certain situations or events (Echeverría, 2003). Observations will thus change according to the emotional state in which the individual is in. Therefore, it becomes relevant to sense and understand how the person feels when conversations take place. Every individual has a repertoire of emotions, and they might differ in intensity. The people who tend to experience negative emotions towards some events might reduce their possibility of growth, since they limit their possibilities of action.

Human beings observe according to the *distinctions* they possess. This means that individuals incorporate different *linguistic acts* and different ways to see the world, and this provides a catalog of interpretations that grows every day. The *distinctions* are consistently incorporated into the daily routines of the person. Here is an example: if a person goes to enjoy a starry night in the countryside, they will probably see stars in the sky. If that same person is joined by an astronomer or an astrologist, however, the sky they will see will be different because the astronomer or the astrologist will provide *distinctions* in the observation that were not visible to the observer before. This is when the observer shifts, and has no way back to see things the same way. The *observer* changes because they learn a new *distinction* that was not there before – either because of the lack of knowledge or because they were not placed in a space and time situation that could allow them to ask themselves more about a particular phenomenon. *Distinctions*, then, are new meanings and interpretations to events or concepts used to describe anything that happens. In the organization, facilitators have the possibility to be those *observers* that assist other peers and colleagues to incorporate new meanings in their daily conversations. When new *distinctions* are added to an observer's catalogue, more possibilities of action emerge.

So far, we know that language, corporality, and emotionality play an important role in the way adults learn. We know that the way individuals talk shapes their reality and one key concept that assists *observers* in their transformative learning experiences is known as *turning point*. This phenomenon appears, for instance, when an *observer* feels and thinks that they are not working well in the environment that they live or work in. *Turning points* are, in fact, *judgements* that happen in life when we expect different things to happen. Different *observers* might have different *turning points* because every

person will see things differently, and some of them will not see the same judgment in a particular situation. It is important to notice that a *turning point* is not a problem; it is only a different way of observing things. When an employee says, for instance, “I can’t handle this” or, “This is not possible for me, I can’t do this,” it is an example of a *turning point*. This allows a space for reflection and understanding about what is happening to that observer, how they are using language, and how their emotions and body reacts. *Turning points* can be negative or positive; they depend on the observer and how they see the world. Organizations have *turning points* too, and it is often to find that when corporations introduce new products or services, they change their images or slogan and even hire new employees with different profiles to accommodate. Those companies used that *turning point* to engage in new conversations and therefore, new observations.

What grounds the OSAR Model is the element of conversations. Observers hold conversations every day, all day and with peers, colleagues, leaders, family, and friends. Some conversations might be private, like when people take time to meditate or reflect on a specific matter. However, most conversations in the workplace will be public and whatever people say shapes the way they achieve results and organize their work. Facilitators must consider that to engage in effective public conversations, an element of trust and respect for everyone’s opinion is of utmost importance. If trust happens, then observers feel free to explore a new world of possibilities.

For OoL, conversations are relevant to understand the world; however, the listening competency makes the process more meaningful since it helps to validate what has been spoken. Active and open listening is essential to enhance the transformative learning experience at the workplace. Echeverría (2006) says that, “Listening is the most important competency in human communication” (p. 74), and goes on to say that “listening = perceiving + interpreting” (p. 80). Therefore, when people listen carefully, they are perceiving and interpreting what happens in their world. The job of the listeners is to make sense of what people are saying. Inside organizations, interpretation happens all the time and at all levels: some will produce favorable results and others will lead to different actions and decisions. Interpretations are crucial when people establish conversations; observers must feel respected and confident to ask questions and clarify something confusing. If people in conversations learn how to listen actively, they are

more likely to achieve better results without *judgements* blocking the way. Observers are, “autonomous source of sense making” (Echeverría, 2006, p. 88) and there are as many interpretations as people and, “the sense of what the listener gives to what was said by the speaker never equals to the sense that the own speaker gives what it says” (Echeverría, 2006, p. 89). This is a key element for facilitators when teaching a class or giving feedback to someone. The key is to listen and be open to possibilities but most importantly, to allow room for every person to positively change some behaviors or ideas that enhance their skills to ultimately overcome challenges and accomplish goals.

Finally, two elements in conversation that happen constantly are defined in the OoL as *proposition* and *enquiry*. When *proposing*, the speaker will share any *linguistic acts* such as *petitions* or *promises*, and even experiences or opinions. While *inquiring*, the speaker will offer a space to safely listen to what the observer has to say. These two acts happen invariably in conversations and in training exercises and learning experiences.

Transformative Learning Theories & Organizations

Transformative learning has been widely explored by authors like Jack Mezirow (1997, 2000, 2005) and Malcolm Knowles (2012). Mezirow (2005) states that, “learning is understood as the process of using a prior interpretation to construe a new or revised interpretation of the meaning of one’s experience as a guide to future action” (p. 5). He further notes that in order for adults to learn, they need to make sense of the information they receive. To experience real transformation, adults need to transform the, “taken-for-granted frames of reference (meaning, perspective, habits of mind,) to make them more inclusive, discriminating, open, emotionally capable of change, and reflective so that they may generate beliefs and opinions that will prove more true or justified to guide action” (Mezirow, 2004, p. 8).

Transformative learning in organizations happens naturally since leaders and employees engage in different projects and initiatives that demand the acquisition of knowledge, but most importantly, the acquisition of skills.

Organizations are, “social entities that are goal-directed, are designed as deliberately structured and coordinated activity systems, and are linked to the external environment” (Daft, 2013, p. 12). If we also consider the OoL perspective, organizations are, “a linguistic phenomena, units built from specific conversations, which are based on

the ability of human beings to carry out mutual commitments when they talk to each other” (Echeverría 2003, p. 47). This means that organizations are a network of constant conversations and also are places where knowledge plays an important role. However, before, at the beginning of the 20th century, manual labor was predominantly the skill required to work, like in assembly lines and automobile industries. *Transformative learning* happens as a part of the construction of new organizations where knowledge is valuable, and skills assist employees to fulfill their promises and commitments to peers, colleagues, leaders, and clients. Workers nowadays are no longer an extension of a machine and are evolving from bureaucratic systems with, “very impersonal, minimizing irrational personal and emotional factors and leaving personnel free to work with a minimum of friction or confusion” (Owens & Valesky, 2015, p. 80) to places with more flexibility to act, learn, and produce different results.

Organizations are places where, “superior performance depends on superior learning” (Pugh, 1997, p. 486) and authors like Peter Senge (1990), in his work with different companies around the world, has detected that people continually, “expand their capacity to create the results they truly desire, where new and expansive patterns of thinking are nurtured, where collective aspiration is set free, and where people are continually learning how to learn together” (p. 3). This proves the need for effective training and learning experiences inside the workplace. Peter Drucker, a leading author in the management field, says that the, “formation of people needs to be carefully examined and applied, the formation could occur through an organization providing training programs, through the organization’s culture, or through some outside source” (Paskewich, 2014, p. 661). So, learning and perfecting new knowledge is what leads an organization to better performance and success.

One essential aspect that shapes how an organization is going to adopt practices and share thoughts and beliefs is the *organizational culture*. Edgar Schein (2010) states that this concept refers to,

A pattern of shared basic assumptions learned by a group as it solved its problems of external adaptation and internal integration, which has worked well enough to be considered valid and, therefore, to be taught to new members as the correct way to perceive, think and feel in relation to those problems. (p. 18)

Culture is one of the elements directly linked to success in performance and leadership practices (Schein, 2016) and recently, Geert Hofstede (2017) said that *culture* is defined as, “the way in which members of an organization relate to each other, their work and the outside world in comparison to other organizations” (p. 1).

In organizations, some skills are enhanced by the culture – for example, active listening, organization and planning, and leadership. Individuals might behave differently according to the codes of conduct and culture dictated by the organization.

Employees as Learners

Employees’ needs are directly related to two aspects: their role in the organization and their performance in the position (Alles, 2005). Human Resources in organizations is the department in charge of the design and update of job descriptions; with these documents, the company maps out who does what and what the expected results of each individual contributor are. Every employee comes to work with a set of skills and technical knowledge that help them in their daily routines and in achieving their goals. The demands of a job change over time and the employee needs to be trained to interact better and make the most out of their previous experiences.

Transformative learning theories have shown that adult learners, the ones that will be found inside organizations, have certain characteristics that have to be acknowledged when doing learning activities. Michael Knowles, in his research to understand how adults learn, identified five basic assumptions of this type of students: (1) they are self-directed and bring experiences with them to share in the learning environment; (2) they are ready to learn; (3) they are problem-oriented; (4) they need to see the immediate application of what they learn; and (5) they are motivated by internal factors (Knowles, Holton, & Swanson, 2012).

Understanding these characteristics, facilitators must consider that the learning experiences they design have to be customized and adapted to meet specific requirements and ensure immediate applicability. In addition, learning experiences must contain a good level of problem-solving situations to promote critical thinking and curiosity.

The work of Mezirow (2000), Knowles (2012), Echeverría (2003,) and Machercher (2014) show common themes that must be considered as well, such as: the curriculum must be built around the needs of individuals; the facilitator must allow

spaces of curiosity and inquiry; the facilitator should rely on the experience that the employee carries and consider it when designing materials; and finally, the facilitator should inform employees why the training is happening and what the desired outcomes are.

In both OoL and *transformative learning* theories, the conversation is a crucial element and through it, employees in organizations can explore new knowledge topics, reflect on them, and build new or alternative interpretations.

Like in OoL, *transformative learning* theories have a few concepts that can be transferred to the learning environment. These are *frames of reference* and *habits of the mind*. *Frame of reference* refers to a, “habit of the mind and resulting points of view” (Mezirow, 2000, p. 17) A *habit of the mind* is also a set of assumptions and/or oriented predispositions that act as a filter for interpreting the meaning of a given experience; some habits might be found in contexts like sociolinguistic (norms and customs), moral-ethical (values, moral norms), philosophical (religion, spirituality or transcendental worldviews) or psychological (personality, esteem, self-concept) (Mezirow, 2000). *Frames of references* can be compared with the concept of *judgment* in OoL since both come from social contexts or preconceived ideas. To transform a *frame of reference*, it is necessary to modify *habits of the mind*, and this is only possible through critical reflection and the modification of points of view. Once this modification happens, the main goal in adult education, which is to become autonomous, responsible thinkers, is achieved (Mezirow, 1997).

Frames of reference and *habits of the mind* are comparable to *judgments* in OoL, since they carry an important element of the perception of the world as the individual experiences it. When the individual becomes critically reflective they modify their *frames of reference*. In OoL, this would mean that the person is experiencing *second-order learning* since the observer has new distinctions that incorporate into their interpretations.

The Skills

Human Resources departments are typically responsible for the training of *technical skills* (work-related, like software and machines) and *soft skills* (related to people and interactions) to ensure successful outcomes in employees. *Soft skills* have a

human approach; Martha Alles, an scholar widely recognized for her work with *soft skills* in Latin America, defines them as “the characteristics of personality that are based on behaviors which generate a successful performance in a job” (2005, p. 12). For Anderson (2014), *soft skills* are traits that affect a person’s ability to interact effectively with coworkers and costumers.

There are different skills models in the market. For Latin America, Martha Alles’ (2005) model is widely used. She has developed manuals and guidelines to define, measure, and explore skills in the workplace. Her approach to skills includes the measurement of more than 140 skills in 5 levels (From A to D, where A is s top performer and D is s low performer). Here, a skill like *collaboration* is defined as the, “ability to work in collaboration with multi-disciplinary groups, with other areas of the organization or external agencies with which it should interact. It means having positive expectations on the others and interpersonal understanding.” (Alles, 2005, p. 51). The Level A of mastery with this example indicates that the employee, “complies with its obligations without ignoring why the interests of other areas and theirs. The person is reliable and holds a solid reputation in the community where they belong” (Alles, 2005, p. 51) while a Level D shows, “little willingness to do other kind of contributions to other people” (Alles, 2005, p. 51). Other models like NASA (2007) studied 20 skills grouped in 5 categories: personal effectiveness, discipline, managing information and knowledge, business acumen and leading and managing people – and team leaders, managers, and executives can benefit from the definitions at different training settings. For NASA, *collaboration* means, “an emphasis in a team approach to work promoting and atmosphere of cooperative and collaborative effort” (2007, p. 4). With these two examples, we can see that skills vary in definition and inside organizations, HRD can choose to use an existing model to measure skills for their employees, or can create their own using different scales of measure.

CHAPTER TWO: THE LEARNING ENVIRONMENT AND LEARNING RESOURCES

Adult learners must feel welcomed and cared for when they attend training sessions, either in a traditional form, with a facilitator in charge of the course, or in online environments where the facilitator and other students participate in the learning experience digitally. The environment will also inform the kind of training prepared, and if the setting is well-prepared, the learner will focus their total attention.

The Setting

The context in which the training will take place invites the students to engage in the topic. Juanita Brown (2006), the creator of the World Cafe conversation technique, indicates that the space to learn must be inviting and adequate for them to feel comfortable engaging in conversations that will uncover collective intelligence. It means that adults already possess answers to all problems; they just need to be capable of establishing proper conversations to agree on the solutions and next steps to take action.

Facilitators inside organizations tend to use the resources they have on-hand. Some places typically used to train employees are meeting rooms, gardens, dining rooms, and offices. It should be noted that every space inside an organization has the potential to be used as a training space; however, the facilitator must remember the purpose of the training and reflect of the effect of using a specific space to teach a lesson.

The Delivery

For many years, the student would go to a classroom as a designated learning space to understand new information and also to receive knowledge from a tutor or professor (Song, 2016). The use of printed books and chalkboards was the traditional way in which millions of people learned and opened their minds to information. However, the knowledge did not flow as fast or as dynamically as we know now, mainly because it was restricted to certain publications and also the acquisition of new materials in schools which could take time and money. This was a common scenario all over the world, and after attending school for at least 20 years, the adult student was ready to assume a position in a company and continue a career in a particular discipline. For most students, the teaching-learning process formally ended there; at that point, every person would continue learning on their own through more books or by watching TV documentaries,

but also by sharing with other people information that could be useful to solve a particular situation. Inside organizations, people would learn by doing or copying models that were proved to work.

Online learning environments have helped facilitators and instructional designers have more interesting challenges in regards to how to present topics and how to use elements like color, screens, and movement to keep the student focused on the information presented (Selwin, Gorard, & Furlong, 2006). All the technological advances in learning and the creation of machines and electronic devices have resulted in teaching and learning evolving to a place where topics and learners meet in web spaces. Not to mention, technology, “has become agent of change and innovation in the educational field” (Safitry, Mantoro, Ayu, Mayumi, Dewanti, & Azmeela, 2015, p. 10) mainly because is a close part of our daily life and routine. Now, every student is only a click away from the specific topic he wants to learn through an electronic device and internet access because of the significant offerings available online.

CHAPTER THREE: GENERAL RECOMMENDATIONS

This section contains a general checklist that will assist the facilitator in the creation of training materials to enhance skills inside organizations.

The Training Room

These next elements will assist you in the creation of a suitable space to engage in productive conversations. The next checklist is aimed to gather all elements necessary to make sure the environment is appropriate.

The checklist might be useful in for all learning experiences:

1. _____ **Lighting.** (Windows or blinds are necessary in some rooms to make sure the light coming in is not too bright)
2. _____ **Electricity.** (Validate with experts that all switches, outlets, TV's, screens, electronic devices, etc. work properly and are well installed)
3. _____ **Noise.** (The preference for a training room is that it should be quiet, to make sure every person listens to their peers and colleagues)
4. _____ **Facilities.** (Make sure that for training lessons or sessions longer than two hours, there should be a washroom close to avoid unnecessary movement of the people)
5. _____ **Materials.** (All materials such as paper, pens, pencils, binders, name tags, among others are available in the room and ready to be used)
6. _____ **Smell.** (The room should be odorless; some employees might be allergic to some scents or may develop headaches)
7. _____ **Chairs and Tables.** (Verify the comfort of the chairs and the cleanliness of the tables and desks in the room; if comfortable chairs are not available, consider not having the people sitting down for extended periods of time)
8. _____ **Accommodations for Disabilities.** (Make sure that every room has proper space and equipment to receive someone with wheelchairs, crutches, casts and so on.)
9. _____ **Snacks and Food.** (Set a place where beverages and snacks can be placed; it is suggested to place that space in the back of the room where people cannot be interrupted while they participate in the lesson)
10. _____ **Ventilation.** (Check for the right operation of the A/C as well as windows to ensure there is enough fresh and clean air in the room)

The Design of Materials

The creation of materials is directly linked to the topic addressed and the audience that will take part in the training experience. There are some elements in the training experience that must be considered to ensure the effectiveness of the session.

1. **Understanding the Requirement.** The facilitator must establish a formal conversation with the people who need the training experience to understand the specific demands. These requirements follow certain time frames, expectations, current situations that require the need for certain knowledge, the budget, the availability of the team to be trained and the evidence that marks the baseline to compare it with the result, once the training experience is done.
2. **Objective.** Establish an objective and leave it for the individuals to see. It is relevant to always have in mind the expected outcome of the training experience.
3. **Activities.** Plan activities to engage students in the topic. These activities or exercises must be directly linked with the topic.
4. **Conversation.** Design questions that promote critical thinking in the audience. Establishing questions is a great method to make people talk and also to receive feedback from the student's perspective. When conversations take place, it is always great to formulate the questions in a way that responses like yes/no are avoided. Instead questions should inquire more about the private conversation of the person regarding the topic. For example, what are the activities that the team under your command has been doing that challenge previous work methods and who is that helping in the achievement of results?
5. **Prepare the Materials.** Do this in different sections such as background, examples, conversation or discussion, final comments, and feedback. Lessons should be organized and flow nicely.
6. **Validate Current Material.** Validate relevant resources such as videos, conferences, documentaries, books, articles, and newspapers to create study cases for discussion. The authentic material keeps lessons updated and fresh.
7. **Track Changes.** Keep a record of the changes that the material has had and document the version of them. It becomes relevant to understand how many times a particular document or presentation has been altered and why.

The Delivery of Materials

Presentations, videos, audios, movies, posters, markers, etc. are typical materials found in training rooms. The next checklist can be used to validate the necessary materials to teach:

1. _____ Validate the **number of attendees** and make sure to have one or two extra copies of the material.
2. _____ For **printed materials**, the font size (between 14-18 in Microsoft word) and selection of colors must be neat and legible. Verify spelling and provide space to take notes. (If some adult learners are senior citizens, the font size should be at least 18 in Microsoft Word to make sure it is understandable)
 - 2.1 _____ **Binders.** If the course requires to hand in a binder with all the information from the session, make sure there are two extra copies in the room in case they are needed.
 - 2.2 _____ **Photocopies.** If the course content uses photocopies of materials, make sure those are not blurry or incomplete.
3. _____ For **visual materials** such as presentations, posters or banners, verify font size, adequate use of color according to the institutional logos and official colors, and only add key ideas, concise bullet points, graphs or images that ensure the understanding of the ideas.
4. _____ For **in-class exercises**, verify the necessary materials needed such as paper, markers, pencils, pens, sheets, handouts, diagrams, puzzles, and so on.
5. _____ **Provide only the necessary material.** Reflect on the key ideas that the person must keep at the end of the training experience and include that into the material distributed to every participant.

The Online Materials

Delivery of content can be done either in one-on-one sessions or virtual instances like webinars, e-learning materials, or online classrooms.

1. _____ **Platforms.** Use platforms or online services that allow constant modifications of the material (add or remove text, images and distribution of information)
2. _____ **Needs.** Create virtual classrooms according to the client's needs in terms of visual look. Validate colors, logos, distribution, font size, users, and security protocols.
3. _____ **Distribution.** Distribute the information in different pages. Avoid using long paragraphs and text to allow the student to interact better. The use of buttons, checkboxes, questions, chats, discussion rooms, and adding videos or articles breaks the routine and engages the student.
4. _____ **Reflection.** Allow open spaces for the student to write comments and reflections. This space shows the facilitator how the learner is processing the information and if there are mistakes, they can correct them on time.
5. _____ **Interaction with Others.** If the platform allows a space for interaction with other participants, write questions in discussion forums to keep the conversation flowing among and between students and facilitator.

The Instructor or Facilitator

Facilitators are necessary for delivering materials. Their performance in the class helps the students to understand the content better and flow with different conversations or discussions that might arise during the learning experience. Some key aspects to make sure the facilitator is ready to teach are:

1. _____ **Initial assessment.** Understand the client's needs regarding soft skills. Validate their interpretation about what they need and provide information (if necessary) to clarify any confusion that might arise. This initial meeting is where the understanding of the skills that will be included in the training or learning experience.
2. _____ **Purpose.** Clarify the purpose of the training both for the person who requested the learning experience and also to the students. Creating learning objectives is always necessary.
3. _____ **Topic.** Understand the topic and look for any available resources that help in the delivery of the lesson (videos, music, magazines, articles, conferences, books, video games, board games, and simulators). The use of different tools makes the lesson versatile and engaging.
4. _____ **Experience.** In the creation and delivery of materials, make sure to use the knowledge that people already have as well as the experience in different areas, sectors or even countries. People relate better to topics if there is a link between experiences.
5. _____ **Applicability.** Make sure to connect with the students saying how they can apply what they have learned in the classroom.

The Conversation

Conversations are the key element to this handbook. Facilitators are in charge of promoting different conversations in the organization and in the training room. Here are some suggestions to create better questions.

1. Avoid long periods of time in a training exercise where people are not talking or sharing information/experiences/concerns.
2. Promote conversation by asking how the information relates to their routines or daily activities (this also works as validation of the applicability of the lesson).
3. Ask the students what their judgments about the topic are and listen to their thoughts. If there is a common theme, validate why they think in that way and discuss what the supporting details for that are.
4. Avoid asking yes/no questions. These do not promote quality conversations.
5. Validate if people are declaring, judging or using previous frames of reference, promising, offering or enquiring. The facilitator must be paying attention to the students' interpretations to offer distinctions when needed.
6. The best quality to develop in the class for both the instructor and the students is the active listening through respect and inclusion of all comments.

CHAPTER FOUR: TRAINING IDEAS TO INCORPORATE IN THE CLASSROOM

The activities presented are organized in three different sections, corporate facilitators can choose to incorporate different exercises into their training exercises and activities.

The first activity will assist HRD and corporate facilitators to detect and understand the skills in need for training and also align their learning activities towards the goals of the organization. The following exercises provide ideas, exercises, questions and handouts to promote conversations revolving around skills at the workplace. Lastly, the final section includes exercises and handouts to evaluate the training process in a personal and group level.

Exercise 1: Talking About Skills at the Workplace

Facilitators must participate actively in the definition of training in the organization. In this chart, some questions are provided to clarify the need to train a specific skill and develop adequate material.

Purpose: To engage in an active conversation with leaders and managers to understand what skills will be needed for the future and how HRD facilitators can develop materials to enhance the skill sets of the employees and provide necessary training

Ties to the Literature: Skills definitions and models (eg. Martha Alles and NASA)

Role of the Facilitator: To participate in meetings and work sessions where there is a conversation regarding soft skills and the impact they have in the performance of the organization

Facilitators must be included in the structural planning of the organization as well as the road maps and business meetings to understand where the company is headed and what challenges the employees might encounter in the near future. By understanding this, they can design and look for training materials and resources that can be incorporated over the next period.

Skill	<ul style="list-style-type: none"> • What is the definition of the skill for the organization? • How will that skill help in the results at this moment? • Is there anybody at the organization who excel in that particular skill? What do they do that shows that? • What is the scale to measure that the skill is being developed successfully? • How will the enhancement of the skill be of any assistance in the achievements of results in the organization? • Will this training become part of the organizational catalogue of training available for all employees?
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Time	<ul style="list-style-type: none"> • How many hours will the students be available for training? • Is one-on-one training or online is preferred? Is blended training (mix between one-on-one and online) available? • What schedule is preferred (mornings or evenings)?
Participants	<ul style="list-style-type: none"> • How many people are expected to attend the learning/training session? • Do participants know each other? Have they collaborated before in some project or activity? • How old are the participants and what is their academic and professional background? (this helps to see if there are common interests that can be used in the training experience)
Results	<ul style="list-style-type: none"> • What are the expected results or outcomes from the training experience? • Is there any particular activity or project that will provide evidence of the success of this training experience?

Overall Suggestions:

- Every organization has their own way of interpreting skills and competencies in their employees, so facilitators must read materials regarding the scales and definitions used in the company
- When skills are defined, the measurement scales help in the development of proper materials, since there is clear guidance where the person should be headed and what the general expectations of performance are
- Training materials have to be updated regularly to meet the requirements of the organization

The Skills

In organizations, skills vary depending on the type of job, on the products and services they sell to clients and customers, but most importantly, they change because of the organizational culture and the values that surround workplaces (Alles, 2005).

Organizations are places where people spend time, and while accomplishing their professional goals, they learn new information, skills, competencies, ways to solve problems, negotiate and even to collaborate with peers and colleagues from other departments. Every professional interaction carries a skill set, and they have to be reinforced and updated to be relevant to the organization.

Sets of skills and competencies that are typically found in organizations cover aspects like collaboration, communication, leadership, problem-solution, negotiation, organization, planning, creativity and innovation, and many others related to the particular work that is required by the company. Therefore, facilitators should be focused on developing materials and initiatives that allow the employees to perform more competitively and feel capable of achieving what is in their indicators.

When working with skills, facilitators must consider all sorts of activities related to the use of language to transform the way the individual sees the world. With the right materials and activities, facilitators can assist employees in their modification of thoughts and attitudes, and can make them aware of the kind and quality of conversations they have with leaders and peers. By evaluating the kind of conversations they have, workers will experience transformation as soon as they understand how *linguistic acts* such as *declaration* and *judgment* are blocking their views and affecting their actions.

Exercise 2: Establishing a Conversation Network (Conversation Map)

Every skill inside an organization is potentially linked to the use of communication with other people. OoL mentions that organizations are conversational networks (Echeverría, 2003) and inside the workplace, interactions between workers will always be needed. Establishing, strengthening and developing a network and updating it is a way to be aware of the necessary interactions for every position and person in the company.

Purpose: To reflect on the conversations that every person has in the organization and establish the importance of engaging in new conversations with more people

Ties to the Literature: Ontology of Language (OoL), conversation networks

Targeted to: Leaders and employees of all levels and positions

Delivery Method:

- 1) **One-on-One:** In the classroom space with other members of the organization
- 2) **Online:** Through online platforms, facilitators can provide the handout so that employees reflect on the task and fill it out with the correct information

Role of the Facilitator:

- Establish a conversation with the group explaining the importance of establishing conversations in the organization:
 - Talking to other members of the company can enhance the results because more people see the situations that need to be solved
- Explain that every person has different levels of interaction:
 - The first level of interaction shows the colleagues and peers who are most required in the daily routines and processes. These connections happen naturally in the workplace and they have to be clear, honest, and helpful.
 - The second level of interaction shows those colleagues or peers who are a bit distant from the process in which every person works, but they are

needed occasionally. The conversations that take place are more limited. However, this level is still necessary to accomplish objectives and goals in the organization.

- The third level of interaction is the furthest, but it is necessary to engage in different conversations to understand how other departments work, what their challenges are, how they manage to commit, and what new ideas, promises, and petitions can come when there are new interactions happen.

Setting and General Guidelines:

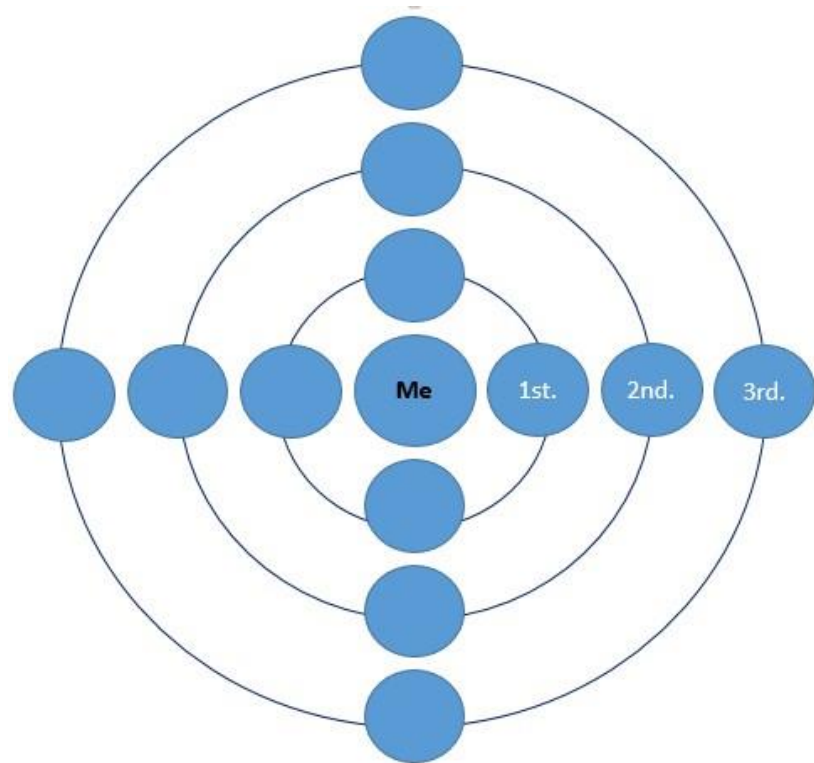
- **One-on-One Training:** This exercise is suitable for individual or group work. The facilitator will explain that conversations are a natural way to communicate in the organization and regularly, people talk to those that are in their workflow. It is important to recognize those conversational networks, acknowledge them, nurture them, and promote fluent interactions. When the conversation flows, the relationship between collaborators grows.
 - The facilitator will provide the handout to the participants so they can write their contacts for the first, second, and third level of interactions (it could be more than four in each level).
 - The participants must reflect and share what their interactions are with peers and the instructor, and receive feedback to see if someone they might need was not mentioned. The group can also assist in the reflection process to think more creatively and suggest what other interactions should be included in the conversational network.
 - Establishing networks help the person to visually connect with the information and to examine the quality of their interactions, what they say, how they say it, what projects or tasks are really accomplished, and what could be improved.
 - To examine the quality of conversations, use the below diagram in the handout; there is a set of questions that should be discussed and a chart with future actions is provided.

- **Online Training:** Define a space in the training where the importance of conversations is explained and allow the participant to fill out the conversational network diagram.

Handout for Exercise 2: Conversational Network Diagram

The conversational network is a tool that helps to map out the interactions that every person has in the organization. There are three levels: the first shows the closest interactions that happen on a daily basis; the second, shows those colleagues or peers who are a bit distant from the process in which every person works, but they are needed occasionally; and the third one is the furthest, but it is necessary to engage in different conversations to understand how other departments or areas work.

Who are your peers and colleagues and where are they situated?



Assessing the Quality of Interactions	
When I interact with (person), do we find possible or new solutions to problems?	
Does our interaction enhance the result of both myself and (other person)?	
Does our conversation have grown through time and flow better?	
Is the interaction necessary to fulfill our objectives and goals?	
Are there promises and petitions made consistently? If so, are they respected?	
Do I enjoy engaging with (person) in projects and organizational initiatives?	
Level	Feedback and Follow-Up Actions
First	
Second	
Third	

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Exercise 3: The Private and Public Conversation

Purpose: To identify the private and public conversation of the individual and assist them in the coherence structure of thoughts to find inconsistencies or new interpretations

Ties to the Literature: Private and public conversations in OoL, habits of the mind

Targeted To: Leaders and employees of all levels and disciplines

Delivery Method: One-on-one (facilitator and individual)

Role of the Facilitator: Establish a conversation with the individual to understand how their private and public conversations differ and assist the person in the understanding of their coherence system of thoughts

Setting and General Guidelines:

- Book a room or office, ensuring that it will be a quiet space to engage in a conversation with no interference. Confidentiality is the most important aspect when establishing conversations with people. Employees must feel comfortable and sure that what is about to be said in that room will remain confidential and safe.
- Allow the individual to feel comfortable and explain that you as a facilitator will be in charge of asking some questions (see handout) to ensure that the person understands the difference between their private and public conversations and the effect of them.
- When asking the questions, make sure that the answers from the person are not just basic or simple sentences like, “Yes, I see” or, “Okay, I understand.” The

conversation is a place to elaborate on those matters that are promoting or preventing the person from growing and using their full potential.

- Use the handout as a record for the facilitator to remember the conversation and provide one to the individual to write their ideas and discoveries. That handout will be useful for future interviews.
- This activity can be done every six to twelve months or depending on the performance appraisal exercises that every organization has. It works as a complementary discussion to understand more about the process of using skills in the workplace.

Procedure:

- Ask the participant the different questions provided in the handout of this exercise and allow space to engage in a conversation.
- The interviewer and interviewee both will have the same handout and will take notes. The idea is to identify elements that are promoting or preventing the performance to be at their optimum level.

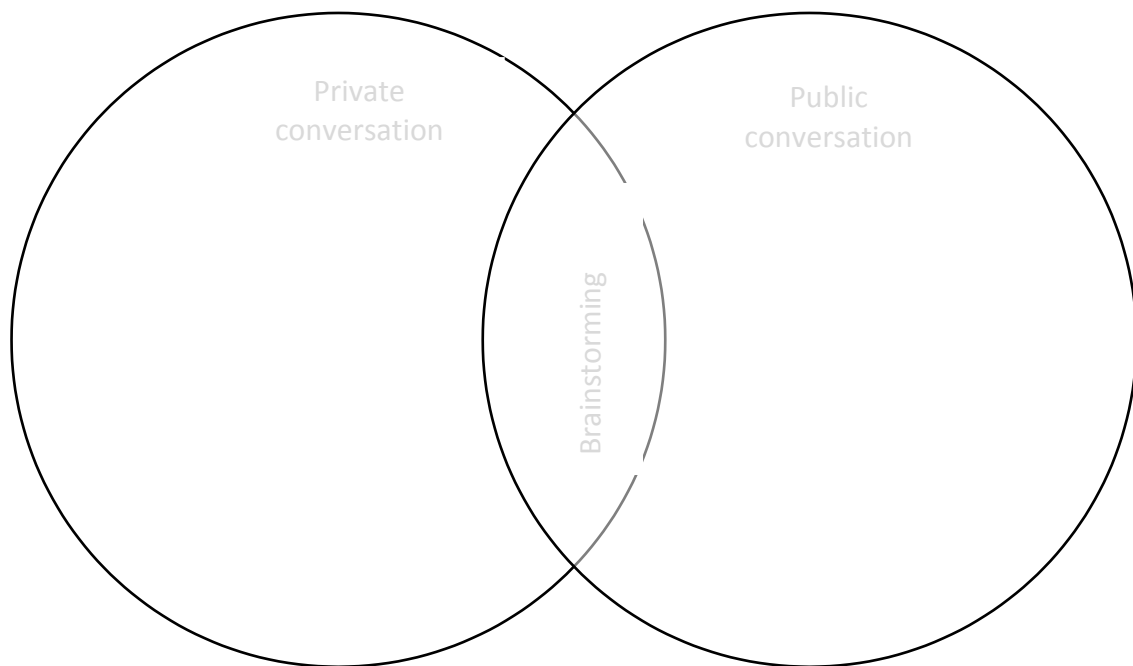
Handout for Exercise 3: The Private and Public Conversation

Public and private conversations happen naturally in all human beings. The conversation we have within ourselves is called, “private” and the conversation we hold with others is called, “public”. It is possible that between your private and public conversations, there are some ideas that are holding you back from achieving your full potential and results. Let’s explore the coherence and line of thought through these questions and later, use the Venn diagram to put the ideas in place and understand how the ideas are really happening.

Questions
1. Is there anything in your thoughts that is related to how to feel about certain skill that you do not share with leaders and peers?
2. When you are being trained to get better in (name of the skill), what are your real thoughts versus the ones you share with your facilitator?
3. When have you found that you start differing from what you think versus what you share? Why is that?
4. What would happen if you express what you are really thinking?
5. What is the public conversation you hold with leaders and peers regarding the use of (name the skill)?
6. What inconsistencies are you finding between your private and public conversations with others?
7. How is the difference between both conversations affecting your results?
8. What would be the value to express the private conversation in the context of your work?
9. Is there anything you think that constantly holds you back from doing something that you believe is right?
10. How is the difference between your public and private conversations affecting your life as collaborator in this organization?

The Venn Diagram below will allow both the facilitator and employee to write the most important thoughts or ideas they have in the conversation down, and then they should discuss the value of keeping them private or public. On the left circle, the private ideas and thoughts can be written and on the right side, the public ones. In the middle, both the facilitator and the employee can brainstorm about strategies and ideas to make sure effective conversations take place without affecting the individual's performance.

Being aware of the everyday thoughts will become a habit and peers, colleagues, and leaders can identify where are the key ideas that are holding them back on their growth process.



Exercise 4: The Linguistic Act Journal

Purpose: To gather and classify thoughts and ideas and understand the composition of conversations inside the organization

Ties to the Literature: Linguistic acts

Targeted To: Leaders and employees

Delivery Method: Individual or group conversation

Role of the Facilitator: Moderator of the conversation

Setting and General Guidelines:

- The facilitator and participants will be in the same room. A quiet environment free of potential noise and distractions (music, electronic devices) will allow the participants to engage in a fluent conversation.
- The facilitator will explain to the person or group the 6 different linguistic acts that interact in everyday conversations. By acknowledging them, skills and behaviors can be noted and individuals can become aware of how they use the language to promote or prevent changes.

Procedure:

- The facilitator will explain to the person or group what are the linguistic acts and how we use them in our daily interactions.
- The facilitator will provide the handout in this exercise to help the participant(s) in the identification of the different components that their conversations have (affirmations, declarations, petitions, offers, promises, and judgments)

- If during the session, a person needs to clarify or classify their thoughts or phrases, the facilitator will make time and assist the participant in any way possible.
- Once the handout is filled out, the employee must take a few minutes during a week or a longer period of time to observe their regular thoughts and ideas and classify them. The purpose is to check how their conversations are designed and what changes are necessary to achieve better results in the organization.

Handout for Exercise 4: The Linguistic Act Journal

Every conversation is filled with different ideas and sentences. All those ideas can be categorized into six various linguistic acts. Let's explore your thoughts during this session and practice separating them and the effect they cause.

Affirmations	
Declaration	
Promise	
Petition	
Offer	
Judgment	

- What happened with the classification?
- Did you find an interesting pattern?
- What is the linguistic act that you use the most? Why?
- Are you more aware of the kind of conversation you have with others?
- What changes in your conversation need to be made?

The Feedback

Feedback is an opportunity to engage in conversations that promote growth and learning for leaders, employees, Human Resources, and the organization in general. The proposal of this handbook is to provide exercises that use conversations as a tool to explore how people learn and use their skills for the betterment of their own results and therefore, the organization's goals.

Feedback in this handbook is separated into two categories; the first one is related to the reaction that happens after a training exercise and how HRD areas must improve the training exercise, while the second one is related to the conversation that leaders must have with their collaborators at the end of a work period. By establishing continuous conversations, the learning process is properly monitored and assessed to understand what future actions must be taken into consideration to ensure the ultimate goals that the organization requires are met.

The learning process can be achieved if, after a period of work, individuals reflect on the actions taken to accomplish objectives. When the reflection process becomes part of the culture of the company, the conversation around it will flow naturally, and employees will know that there are safe spaces to talk about their responsibilities and accomplishments as well as to receive recommendations for improvement.

Exercise 5: Feedback Exercise

Purpose: To establish an organized conversation between leader and employee to discuss the achieved goals in a given period. Explore new actions for the future goals and responsibilities to manage in the future

Ties to the Literature: OSAR Model (Observer – Action – Result), Critical thinking

Targeted To: Leaders, Employees

Method of Delivery: One-on-one (individual conversation between leader and employee)

Role of the Facilitator: Provide leaders with the information regarding the OSAR Model used in OoL and explain the role of actions and results and how, by transforming the observation and encouraging critical thinking through questions, employees can achieve transformative results

Setting and General Guidelines:

- Find a comfortable space to engage in a conversation without potential interruptions and noise
- Establish a rule of honesty and openness that allows the space to be a learning experience for both the leader and employee
- Avoid distractions such as cell phones or any other electronic devices

Procedure:

Engage in a conversation selecting questions from the next sets. Make sure to cover the Results, Actions and Observer sections and aim for a fluid and honest conversation. To

achieve better results, select all the questions and encourage the employee to talk about their overall performance.

1) Results

- What responsibilities did you have to accomplish in this period?
- Are those the results you wished to achieve at the end?
- What was missing? Is there anything that was not accomplished?
- What indicators show your performance (qualitative)?
- Was there anything you did that was not established from the beginning of the period? How did that affect your performance?
- How would you describe your overall performance this year?

2) Actions

- Describe the primary/general activities that led you to have these results. (either positive or negative)
- Are those activities the necessary ones to fulfill your role?
- What were the unsuccessful events and decisions? Why?
- What activities and actions can you keep doing to continue succeeding?
- What elements from the environment affected your results? Which ones would you keep for the future?
- What did you want to accomplish in this period but you couldn't? Why? What's the impact on your overall performance?

3) Observer

- What did you learn about your skills during this period with your results?
- Share with me a situation that during this year made you shift your vision and perform differently? What happened?
- What are your thoughts about your colleagues/peers in the development and collaboration with you? How can you interact better?
- What skills you feel you need to improve? Why those?
- What are your thoughts when you don't accomplish something relevant for you? Share with me your thought process.

- What thoughts have to be challenged and changed to perform/feel better?
- How do you feel with your overall performance? Are those feelings consistent during the year?

From Leader to Employee:

- How can I commit better or differently with you to make sure you accomplish your goals the next period (trimester, semester or year)?
- What do you need from me to achieve your goals?

Overall Suggestions for the Conversation:

- The feedback process is an opportunity to have an open, honest conversation where results and actions are explored from the perspective of the observer. Every observer will bring different interpretations, and the leader must not judge before understanding the scenario in which every action happens.
- Feedback becomes a great space to observe how first and second order learning happens and is also an opportunity to show the employee the difference between changing the actions and changing the observations to achieve different and better results every time.
- Establish a warm rapport and trustable environment to talk and engage in healthy and productive conversations.
- Encourage a conversation where the employee feels supported to explain what happened and ask about details in the activities the person is talking about.
- Avoid judgments such as, “That was not smart to do,” or “I think that what you did was terrible because you didn’t check A, B, and C.” Instead, open a space of possibilities creating questions that promote reflection. With that, the observer (employee) will make sense of his actions and results differently and hopefully interfere positively in future tasks.
- Make notes about the ideas, thoughts, affirmations, declarations and judgements that the employee says during the session. Go back to those that might be affecting the overall performance expected from the employee. Analyze those ideas and provide a different interpretation that could be considered by the employee to perform

Observer	
Questions (From the Handbook):	Notes, Comments, and Reflection:

Commitments between Leader and Employee to Enhance the Overall Performance:	1.
	2.
	3.
	4.
	5.

Commitments, Actions, and Reflections that the Employee Will Do During the Next	1.
	2.
	3.
	4.

Period to Ensure Successful Outcomes.	5.
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Final Comments or Considerations:

Exercise 6: Feedback Exercise (OSAR)

Purpose: To establish an organized conversation between leader and employee to discuss the achieved goals in a given period; explore new actions for the future goals and responsibilities to manage in the future

Ties to the Literature: OSAR Model and SMART goal-setting model

Targeted To: Leaders, Employees

Delivery Method: One-on-one (individual conversation)

Role of the Facilitator: Provide leaders the knowledge about the OSAR and SMART models to understand the interaction between the use of language and a goal-setting mechanism

Setting and General Guidelines:

- Find a comfortable space to engage in a conversation without potential interruptions and noise
- Establish a rule of honesty and openness that allows the space to be a learning experience for both the leader and employee
- Avoid distractions such as cell phones or any other electronic devices

Procedure:

- Establish a conversation using the SMART model as a base to evaluate what happened during a given period and understand how the results were achieved and what are the necessary measurements for improvement

- The conversation will be guided using the acronym SMART, and the leader will be exploring different aspects such as measurements of results to understand the overall performance of the employee and determine actions for the future
 - This exercise is a blend between the OSAR and SMART Models and with both, the conversation is expected to be more successful; establishing a conversation following an acronym helps to get a sense of how the person will perform and what challenges might arise
- The next chart contains the questions and topics to discuss in the feedback session. For further notes, a handout is provided at the end of this exercise:

Acronym	Conversation Elements (OSAR)
S – Specific	<p>Results:</p> <ul style="list-style-type: none"> • What indicators did you have to fulfill this period? • What goals are still incomplete or do not have been achieved? What happened? (Promote the explanation of the context and circumstances that affected the result) • Do you feel that the setting of the goals were clear? <p>Actions:</p> <ul style="list-style-type: none"> • What actions were key to achieve the results this period? Specify? • Would you say those actions were effective? • Would you have done something different? <p>Observer:</p> <ul style="list-style-type: none"> • What did you learn about yourself this period? • What new skills did you use or discovered? How did they help in the accomplishment of your results? • What keeps being challenging for you in terms of skills?
M – Measurable	<p>Results:</p> <ul style="list-style-type: none"> • What key performance indicators reflect the work you did this period?

	<ul style="list-style-type: none"> • What results were extraordinary and which ones still need some work? Why? • Are there some possible scenarios in the future that could be difficult? Will that affect your results?
A – Attainable or Assignable	<p>Results:</p> <ul style="list-style-type: none"> • What timeframes do you think will be needed to finish the new projects assigned to your position? <p>Actions:</p>
R - Realistic	<ul style="list-style-type: none"> • What actions do you think will be necessary to accomplish the goals you have? • What resources will you need to accomplish your work? • Are these goals realistic? Is it okay or do you feel that something might get out of control? What kind of assistance would you need if that happens?
T – Time	<p>Observer:</p> <ul style="list-style-type: none"> • Do you feel ready and well-equipped to take these challenges (for the future)? • Do you have any concerns regarding your skills? Why? In which case?

Overall Suggestions for the Conversation:

- Encourage the active communication from the employee in the space of exploration and reflection for the betterment of their performance.
- Avoid judgments and harsh comments when the employee is explaining their reasons to take action to achieve a result. Wait until the conversation is over to look for new possibilities with the person and agree on different ways to look at the goals.

Handout for Exercise 6: Feedback Exercise (OSAR)

Feedback	
Date: ____/____/____	Name of the Employee:
Period Evaluated:	Name of the Leader:
Overall Performance: (Relate to the evaluation scales in every organization)	Next Meeting to Review Progress:

Concept	Comments / Feedback
S (Specific)	
M (Measurable)	
A (Attainable / Assignable)	
R (Realistic)	
T (Time)	

Additional notes:

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Exercise 7: The Self-Evaluation

Purpose: To assist the student in the reflection and identification of key ideas and reflections coming from the developing of skills at the workplace

Ties to the Literature: OSAR Model, linguistic acts, frames of reference, and habits of the mind

Targeted To: Employees of all levels and responsibilities

Delivery Method: Individual written assignment and individual conversation when needed by the employee or by HRD

Role of Facilitator: Limited; the activity is a self-assessment, and the self-reflection format is to be filled out by the student

Setting and General Guidelines:

- Find a comfortable space to allow the student to fill out the questions without potential interruptions and noise
- Establish a rule of honesty and openness that allows the space to be a learning experience for the employee
- Avoid distractions such as cell phones or any other electronic devices
- If a conversation is needed after filling out the chart, the facilitator must be open to listen and enquire carefully about the aspects of the feedback that the employee considers difficult and complicated
- The environment should feel free of judgements and if they happen, they must be based on proof and information

Procedure:

- After any course and activity that relates to the development of skills at the workplace, the employee must learn how to reflect on linguistic acts. Since the use of language shapes the vision of the world, the employee must be evaluating constantly their use of it and must be aware of the nuances that might happen and how they impact the employee's daily routines.
- Invite the employee to engage in a self-reflection or self-feedback activity in a quiet space.
- Hand in the handout and share with the employee that the responses will help them to understand their learning process and their thoughts better. Also, by looking at their different declarations, judgments and comments, they might come up with new ways of incorporating new behaviors and thoughts into their daily routine.
- Allow a respectful space of reflection and if an honest conversation is needed at the end of filling out of the document, listen with attention and offer interpretations that might assist the employee in their development of new or better ways of conducting themselves.

Overall Suggestions for the Conversation:

- Respect the space and ensure confidentiality.
- Provide interpretations and validate if those new thoughts are useful to the employee in their daily life and routines.
- If additional conversations are needed, focus on the structure of coherence between language, corporality and emotion. When those elements are in sync, the person will flow better in life. However, if that is not the case, something should be done to provide support in the area that is lacking.

- Thank the employee for the time dedicated to the interview and do not close the space for further conversation. If the person feels like having a follow-up or if that is necessary, book another appointment and continue with things that might have been left out or that need more reflection.

Handout for Exercise 7: The Self-Evaluation

The present questionnaire allows the student to engage in a reflective state about the recent training received to improve skills at the workplace. The questions below should be answered from the perspective of how the new learning of skills has affected the employee's performance.

Note: All your answers are confidential and this handout will not be shared with anyone, it is aimed to help you with your reflection process to grow and continue to develop. In case you need further conversation to clarify something you have learned or something unclear, please contact your instructor.

Self-Feedback	
Name:	Date:

Results	
Question	Response and/or Reflection
What new results have you accomplished since you started your training program?	
Were those results planned?	
What challenges are you facing at the moment that need attention?	

How does that affects your current (and future) results?	
What indicators show your performance?	
What adjustments are needed to accomplish your objectives and goals in the position you hold?	

Actions	
Question	Response and/or Reflection
What actions allowed you to achieve your objectives or goals this period?	
What actions taken during this period allowed you to accomplish your results?	

What actions were not correct and need adjustment? Why is that?	
Is there anything you are not doing that you should be? Why is that? Does that affect your performance?	

Observer	
Question	Response and/or Reflection
<p>How do you feel with the results that you have accomplished so far?</p> <p>Did you experience any new thoughts or reflections that have changed the way to conduct yourself at work?</p>	
Has your relationship with peers and colleagues improved? Why is that?	
When developing a new skill, do you feel that is easy to incorporate it into your	

regular daily routines? How does that happen?	
What are your current thoughts and concerns? Describe	
Is there anything that you want to work on and you find it particularly hard? What are your regular thoughts about it?	
Do you feel your concerns and worries are affecting your performance in some capacity?	
Is there anything from your past experiences that might be affecting in a positive or negative way your current performance? If so, please detail what, how and why.	

Exercise 8: Group Feedback World Café

Purpose: To establish an organized conversation using the World Café Methodology to come up with ideas, reflections and suggestions on how to develop, enhance and reinforce skills at the workplace

Ties to the Literature: OSAR model, World Café methodology, habits of the mind, frames of reference, and critical thinking

Targeted To: Employees at all levels; groups of people either from the same department or from the company as a whole

Delivery Method: Group work (at least 16 people needed)

Role of the Facilitator: Mediator, time management, and provider of questions; general feedback and collective learning moderator

Setting and General Guidelines:

The World Café Methodology establishes that the collective intelligence of a group of people manifest when they respond to questions that matter (Brown, 2006). There are seven steps that must be followed to conduct a successful event:

- **Set the Context:** Clarify the purpose of the meeting and the expected results. In this case, the meeting will be to explore how certain sets of skills have helped or restricted the accomplishment of goals in the organization.
- **Create Hospitable Space:** Create a welcoming and comfortable environment where conversations are invited and promoted. Tables and chairs for every participant are

required as well as paper and pencils to write the ideas that every group needs to express.

- **Explore Questions That Matter:** Create sets of questions that allow the employees to reflect and extract their reflections, thoughts, ideas, and concerns. The facilitator will create sets of questions (see handout) to engage in conversations that matter and ensure that everyone has a safe place to participate.
- **Encourage Everyone's Contribution:** Every participant should share and talk to the rest of the group. The facilitator must ensure everyone shares their points of view.
- **Cross-Pollinate and Connect Diverse Perspectives:** Carry new ideas and concepts from one table to another and share new discoveries and ideas. The world café is a dynamic procedure where people move from one place to another and meet other team members to share information from their previous group. Therefore, in every group, people will engage in conversations and when they move to another group, they carry with themselves the important ideas to share with others.
- **Listen Together for Patterns, Insight, and Deeper Questions:** Collective contributions towards a question or matter that is addressed (or a concern of the group). When these conversations take place with large groups of people, some patterns in the conversation start arising and those are called “collective intelligence”. Those patterns are later analyzed as a group since everyone shares the same ideas.
- **Harvest and Share Collective Discoveries:** Collect group knowledge and ideas. The key to any conversation like this is to share what they have discovered and to keep opening spaces where ideas, suggestions, innovation and creativity are welcomed.

Procedure:

- The facilitator will prepare a room with tables and chairs for the participants. The tables can be rounded or squared and must be placed with a considerable amount of space in between. On every table, there should be a long piece of paper and a marker. When the facilitator also includes some flowers, fruit or a decoration, it is even better at creating a welcoming environment like in a cafeteria.
- In every table, there should be chairs for the participants. If the group consist of 16 people, at least 4 tables with 4 chairs each should be prepared. This technique allows

facilitators to host as many people as they need, it can start with a small group and it can go up to thousands at the same time. The following diagram shows the distribution for 25 people in 5 rounded tables.

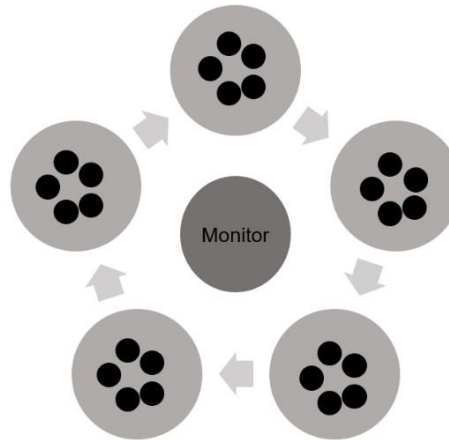


Figure 3. Distribution of participants in a World Café.

- The facilitator will act as a monitor and will provide the questions to reflect and will manage the time for the activity.
- The activity will begin when all participants are seated. The monitor (facilitator) will explain that at every table a person should serve as a writer, and their job will be to collect the main ideas and key points that the group discusses. For every question, the group will have between 3 and 5 minutes to share what they think. The communication must be concise and to the point and the rule of the writer will also be to make sure every member of the table shares a key idea. Once the time is up, one member of every table will rotate to the table on the right; the writer will never move, they are the only ones that will remain seated in the same place the whole time the activity lasts. Therefore, every round, a new member will join a conversation.
- Once people have moved, a new question will be given to all the participants (the questions can be shared verbally with the help of a microphone, or they can also be shared in a piece of paper in every table or even put up on a screen for everyone to see. The groups must receive one question at a time.
- For the world cafe to be effective, at least a set of 7-10 questions can be explored to make sure the conversation is rich and full of content.

- The role of the writer at the end will be to share with the monitor and will all the group all the key ideas that happened in their tables. It will be common to find themes and comments that will be the same or very similar because when people move from one table to another, they “cross-pollinate” the ideas.

Examples of questions to explore when skills are the main subject of the World Café session, including:

- How does the development of skills allow us to perform better as teams and as an organization as a whole?
- What sets of skills that we don’t own yet, will get us to move from where we are to where we want to be (accomplishing the vision of the organization)?
- What kind of behaviors are preventing us from achieving the results we want? Why is that?
- Are there any skills that we possess as a team or organization that can be enhanced to ensure success? Which ones and why?
- What techniques and training ideas will work better for our group to assist us in incorporating new behaviors or get better in the ones we have?

Conclusion

The primary focus of this handbook is to show and share the application of Ontology of Language (OoL), *transformative learning* theories and teaching ideas in adult education settings inside organizations. By combining these approaches, the facilitator can introduce new concepts to their repertoire of activities and assist individuals in their particular needs of instruction when soft skills are required.

Facilitators must remember that every conversation matters and that the appropriate use of language can create new worlds of possibilities when they design adequate spaces inside organizations to promote high-quality discussions among groups. The role of the facilitator is to incorporate in every training questions that provoke curiosity and enhance the learning experience with materials adapted to the particular needs of every participant, but also to the group as a whole. When the elements of OoL are incorporated in sessions, the feedback from the participants to the class and the instructor can be analyzed to find deep meaning to continue to work on those aspects that need more improvement. Facilitators need to be current in new discoveries about teaching techniques for adults, new technologies that can be of assistance, like online sessions and even the use of social media to be in touch with their students' needs to address them.

My hope is that these guidelines and exercises benefit the design and delivery process of training materials inside organizations. When facilitators provide a space of conversation to address important matters, employees and leaders can find solutions to challenges and situations that are complex and in the process, develop skills that will accompany them throughout their life.

CHAPTER FIVE: SUMMARY, DISCUSSION, AND IMPLICATIONS

Summary

This research was inspired by the contributions of Rafael Echeverría (2003, 2006) and his work on OoL, a discipline that explores the generative character of language in the creation of new realities based on how human beings talk. Deciding to use OoL as a platform for this study, and to combine concepts of OoL and *transformative learning*, allowed me to build a handbook for facilitators with ideas and exercises that consider new approaches, which will assist them in their training work inside organizations. Companies worldwide face the challenge of recruiting and training high-caliber employees who must work towards a specific set of goals. To achieve those goals, they require adequate academic and technical knowledge, but most importantly, they must collaborate with other people and design successful conversations – conversations which open possibilities for action, initiatives, and proper coordination of projects,

Skills change and adapt over time and respond to the organizational culture in which every employee works. Therefore, employees must continually be assessed, trained, and evaluated to make sure that their application is effective and adaptable. The design of conversations at the workplace can greatly change how things are perceived, how problems are defined, and how to approach designing solutions using the resources that the organization has. People are the most relevant asset in the workplace; it is

through their *observations*, *declarations*, and *judgements* that different projects and initiatives come to fruition to improve the quality of life inside an organization.

Findings and Discussion

The handbook, *A Transformative Learning Experience in Today's Organizations* was created as a resource to support the training process inside organizations. With this manual, facilitators and HRD experts can enhance their learning materials and experiences in their development of soft skills inside organizations (Robbins, 2009). The employees in organizations are adult learners, and the literature shows that these students must make sense of the experience they have accumulated and link new information to previous concepts and ideas (Safitry et al., 2005). From the *transformative learning* theories, adults need to engage in critical thinking activities to produce transformational experiences, and that can happen when the materials and delivery promote new ways of understanding the information and incorporating it into employee's daily routines. When the student holds new *distinctions*, they conduct their actions in more reflective and conscious ways.

OoL and *transformative learning* theories both agree that *discourse* or conversations are crucial to promote *transformative learning* experiences. Therefore, facilitators must consider creating effective questions that lead to meaningful conversations where students encounter new interpretations that reshape their approach to situations in the workplace. When an adult learner is working on their soft skills, like negotiation, communication, or problem-solving, they need to reflect on the actions and results they see and how a different interpretation of their actions could affect their results. Outcomes will always determine the efficiency of the training exercise; if students accomplish more satisfactory results as the result of training, it proves the

positive effect of the effort that HRD areas do with their peers in the betterment of the general goals of the organization.

Implications for Further Research

After completing this research project which considers a philosophy of language not widely explored in English, transformative theories based on learning processes, and finally, the organization as a setting for employees to learn and develop skills, it is clear that there are some implications for future studies.

Firstly, there are implications for Human Resources, as it is the department responsible for the attraction, development, assessment, and promotion of people. The learning process inside the organization needs to be redesigned to suit needs of employees according to the primary goal of the position everyone holds, but also, to meet the ultimate organizational goals. Therefore, training must not be just a checklist of the amount of hours and courses every person has to take in a year; training should be a strategy that is regularly reviewed and carefully defined (Robbins, 2009). Employees, at this moment in time, are working in corporations that value knowledge, ideas, creativity, and innovation rather than manual labor. Thus, Human Resources must collaborate closely with leaders in the organization to design conversational spaces where new possibilities are explored, where people can *affirm, declare, promise, or judge* something, and other collaborators can join a conversation to clarify interpretations that are blocking potential accomplishments and growth. The development of skills such as negotiation, collaboration, innovation, and leadership can make a difference in the way a team is organized and how they meet certain goals. People need to learn how to become aware of their potential, and through organized conversations and feedback, employees can grow and take on new challenges without being scared of their skills. If the right materials and

instruction are developed according to the organizational culture and needs, employees will find a way to participate, learn, and share, because that is the path that leads to success. Overall, organizations need to know the power of establishing quality conversations that allow employees to interact and build products and services using their full human potential.

The second aspect is related to facilitators, who are the people in charge of developing materials and learning spaces (Alles, 2005). They need to understand how adults learn in organizations (Blanchard, 2010). In HRD, the profile of people in charge of training might or might not have a background related to adult education. Therefore, facilitators must understand the basic knowledge about *transformative learning* or *andragogy* theories so that they know what motivates employees to learn and get involved in training initiatives – and not only to complete an institutional requirement listed in their annual agenda. It is also important to learn about different techniques related to the teaching, learning, delivery, and construction of activities and materials to enhance the learning experience. These methods could range from linguistic approaches to the use of video games, drama clubs, dancing lessons, community events, sports, or even cooking lessons. Facilitators need to see training as a strategy that goes hand-in-hand with the overall vision and goals of the organization. When perceived that way, the design and implementation of programs will have the desired effect and impact on larger strategies such as sustainability, permanence in the market, and the attraction of clients, because people will join efforts to achieve common goals and share the vision of the business. Another implication for facilitators is that they might need to experience OoL first as a way of living and interacting with their private and public conversations. To get an idea of how the concepts are used, facilitators

may require the assistance of an ontological Coach to establish conversations exploring *affirmations, declarations, promises, and judgments*, and with this, evaluate how the *linguistic acts* have enhanced or restrained their skills and the potential of the individual itself.

The third implication deals with the delivery and practice of training projects or initiatives. Nowadays, and because of the constant use of technology, more young employees and workers choose social media, webinars, tutorials, or online forums to get the information necessary to learn what they need in the workplace. The development of materials has to be concise, reflective, and substantial so that people reflect on the important matters and take action when it is needed. Online forums provide a space for people to interact.

Therefore, those conversations must be reviewed by the facilitator to make sure the employees are on the right track when it comes to strengthening their skill set (Senge, 1990). Feedback must be provided to make sure employees understand, even through online chats, that language plays an important role in creating the reality in which they live, and how through what it is said, employees can grow their skills and become more competitive.

And finally, an implication about OoL as philosophy or theory exists. So far, OoL has only been applied to ontological coaching processes inside organizations. This study is the first attempt to mix OoL with *transformative learning* theories and implement a handbook in organizational settings. With this in mind, this first handbook might still have room for including more precise activities that will suit specific needs in organizations. The general activities and formats described in the handbook will, however, assist facilitators, though it will not provide individual solutions to particular problems that already exist. To adapt materials and exercises, the facilitator must work in

close collaboration with the people inside the organization and listen to their conversations to assess where the problems are and how through individual interventions, solutions can be found in favor of the growth and expansion of abilities of the people. The application of the theory explained in the handbook and using the concepts from OoL and transformative learning can be assessed in a pre and post evaluation. This can be done either with control or experimental groups inside organizations. This notion will prove and promote feedback on the exercises, the ideas and the need to change or incorporate different concepts to strengthen the handbook. After studying OoL and transformative learning theories, my last and remaining question is whether the transference of knowledge to promote change in behavior can really be accomplished by incorporating new conversations into the workplace and the effect on that in the organizational culture of the company.

Conclusion

The main goal of research project was to inform facilitators inside Human Resources departments of the existence of the Ontology of Language (OoL) as a discipline that can be used to explore and create better learning materials for adult learners. When the language that facilitators use is clear, concise, and adequate, students identify with the body of knowledge that they have to learn and, also, of the need of using those new insights in their daily routines in the workplace. By understanding the generative side of language, people become more aware of their strengths and limitations, and by doing so, it is easier to develop interventions that assist them in whatever they need to improve to achieve the outcome.

The transformative aspect of learning happens once the individual changes views and previous understandings about the world, and opens spaces of possibilities and different interpretations that might benefit their current situation.

It is my hope that the use of Ontology of Language (OoL) in English-speaking environments can shed light on the work that a Spanish-speaking philosopher has developed and incorporated in many organizations, with the ultimate aim of improving the quality of work and life for individuals. When facilitators practice different techniques and approaches, learning becomes an active process that employees value and recognize as necessary to grow and accomplish goals. Through this process of studying adult learning theories and combining them to produce a handbook to assist facilitators, I found incredible satisfaction in knowing the body of knowledge that accompanies the processes of Human Resources regarding training. Learning is a skill that every person has, and inside organizations, it is evident that every person will use their knowledge in a way that makes sense to them. Designing conversations inside the workplace might sound vague and simple; however, it is through conversations that things become relevant, and it is also through conversations that ideas are shared and new products and services are created. Language is the window to explore how a person sees the world and makes sense of it, and facilitating effective conversations with leaders and peers could be the *turning point* in developing talent and giving people the opportunity to shine and feel confident.

Now that different generations of people are joining the same workspace, it is relevant to think in a different approach to training; in some cases, young workers who are joining the company for the first time will not be as skilled as others in their competencies such as teamwork, negotiation, or strategic thinking.

However, if the organization has a conversational platform that assists everyone in accomplishing their goals and giving honest and caring feedback, everyone will grow and strengthen their skill set. The wonder about *soft skills* is that in the years I have been in Human Resources, I have observed that those skills only grow and move forward, because they become part of the personality of the observer – and that is how people develop their unique profile.

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CHAPTER FIVE: SUMMARY, DISCUSSION, AND IMPLICATIONS

This chapter addresses the general findings of this project as well as the implications for training facilitators in Human Resources who wish to incorporate the Handbook in their corporate training programs.

This research was inspired by the contributions of Rafael Echeverría (2003, 2006) and his work on OoL, a discipline that explores the generative character of language in the creation of new realities based on how human beings talk. Deciding to use OoL as a platform for this study, and to combine concepts of OoL and *transformative learning*, allowed me to build a handbook for facilitators with ideas and exercises that consider new approaches, which will assist them in their training work inside organizations. Companies worldwide face the challenge of recruiting and training high-caliber employees who must work towards a specific set of goals. To achieve those goals, they require adequate academic and technical knowledge, but most importantly, they must collaborate with other people and design successful conversations – conversations which open possibilities for action, initiatives, and proper coordination of projects,

Skills change and adapt over time and respond to the organizational culture in which every employee works. Therefore, employees must continually be assessed, trained, and evaluated to make sure that their application is effective and adaptable. The design of conversations at the workplace can greatly change how things are perceived, how problems are defined, and how to approach designing solutions using the resources that the organization has. People are the most relevant asset in the workplace; it is

through their *observations*, *declarations*, and *judgements* that different projects and initiatives come to fruition to improve the quality of life inside an organization.

Findings and Discussion

The handbook, *A Transformative Learning Experience in Today's Organizations* was created as a resource to support the training process inside organizations. With this manual, facilitators and HRD experts can enhance their learning materials and experiences in their development of soft skills inside organizations (Robbins, 2009). The employees in organizations are adult learners, and the literature shows that these students must make sense of the experience they have accumulated and link new information to previous concepts and ideas (Safitry et al., 2005). From the *transformative learning* theories, adults need to engage in critical thinking activities to produce transformational experiences, and that can happen when the materials and delivery promote new ways of understanding the information and incorporating it into employee's daily routines. When the student holds new *distinctions*, they conduct their actions in more reflective and conscious ways.

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Therefore, those conversations must be reviewed by the facilitator to make sure the employees are on the right track when it comes to strengthening their skill set (Senge, 1990). Feedback must be provided to make sure employees understand, even through online chats, that language plays an important role in creating the reality in which they live, and how through what it is said, employees can grow their skills and become more competitive.

And finally, an implication about OoL as philosophy or theory exists. So far, OoL has only been applied to ontological coaching processes inside organizations. This study is the first attempt to mix OoL with *transformative learning* theories and implement a handbook in organizational settings. With this in mind, this first handbook might still have room for including more precise activities that will suit specific needs in organizations.

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Conclusion

The main goal of research project was to inform facilitators inside Human Resources departments of the existence of the Ontology of Language (OoL) as a discipline that can be used to explore and create better learning materials for adult learners. When the language that facilitators use is clear, concise, and adequate, students identify with the body of knowledge that they have to learn and, also, of the need of using those new insights in their daily routines in the workplace. By understanding the generative side of language, people become more aware of their strengths and limitations, and by doing so, it is easier to develop interventions that assist them in whatever they need to improve to achieve the outcome.

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